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*Bulletin*

**Title:** Internal Procedures for Coordinating Acquisition Plans  
In Response to AGAR Advisory 83

**Number:** 07-205

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**Expiration:** Until cancelled

**Originating Office:** Acquisition Programs & Oversight Branch, Acquisition and  
Property Division  
Agricultural Research Service

**Distribution:** All REE Employees

This Bulletin is issued to provide guidance to all REE employees on completion of acquisition strategies and to implement the formalized review of portions of those strategies at specified dollar values at either the Department or Headquarters level.

## 1. INTRODUCTION

An Acquisition Strategy is a “roadmap” by which we satisfy a customer’s acquisition needs while meeting other necessary requirements. We do this by establishing the best possible contractual relationship for any given circumstances. In other words, the Acquisition Strategy is the way we maximize performance outcomes. The Acquisition Strategy determines how the item or service is to be bought in a way that provides the best incentive to performance.

The Acquisition Strategy is an inherent part of the Acquisition Plan, which is a plan that coordinates the efforts of all possible personnel responsible for an acquisition. The Acquisition Plan formally documents the approach to fill the need, optimizes resources, and satisfies policy requirements for the proposed acquisition. It answers the “who-what-when-where-why-how” of the acquisition strategy planning process. An Acquisition Plan should be general enough to allow program management flexibility, but be specific enough to give coordinating and approving officials adequate information on the technical and business aspects of the acquisition upon which to base their decision. The development of the Acquisition Plan is a responsibility of both the customer and the Contracting Officer (CO).

A new Agricultural Acquisition Regulation (AGAR) requires review and approval of acquisition strategies at certain dollar thresholds prior to an acquisition office being provided authority to issue a solicitation. This new requirement represents a significant change to our standard operating procedures, one which will require considerable planning and scheduling in order to limit delay in issuing the solicitation.

## 2. POLICY

Formalized and approved acquisition strategies are required for all acquisitions valued at \$1 million or more, inclusive of option periods, quantities and items. This requirement includes orders against Federal Supply Schedules and other agency contracts, and original Blanket Purchase Agreements (BPA) if the maximum ceiling value of the BPA meets threshold requirements. This review process will be implemented for applicable actions effective immediately in order to comply with emerging requirements.

It is Department of Agriculture (USDA) policy that prior to solicitation, the Chief Acquisition Officer (CAO), a title vested in the Assistant Secretary for Administration, approve all acquisition strategies valued at \$5 million or more, inclusive of option periods, quantities and items; all acquisition strategies for major information technology investments; and, all those acquisition strategies otherwise deemed appropriate as specified in Agricultural Acquisition Regulation (AGAR) Advisory 83, dated March 1, 2007. In addition, it is USDA policy that the Head of the Contracting Activity Designee (HCAD) approve all acquisition strategies valued

from \$1 to \$5 million. This responsibility is delegable. In Agricultural Research Service, the \$1 to \$5 million approval is delegated to Headquarters Branch Chiefs and in some instances to the

Procurement Assistance Officers (PAO) in the Area offices. The PAO is authorized to approve the acquisition strategy for other CO's in their Area office, but if the PAO is the CO for the action, that strategy must be approved by Headquarters.

A copy of AGAR Advisory 83 can be found at:

[http://www.usda.gov/procurement/policy/advisories\\_x/agarad83.pdf](http://www.usda.gov/procurement/policy/advisories_x/agarad83.pdf) . Please read AGAR Advisory 83 for specific requirements.

### **3. GUIDANCE/PROCEDURES**

#### **Preparing the Acquisition Strategy**

Planning the acquisition strategy should begin as soon as an agency need is identified. Acquisition strategies are covered in Federal Acquisition Regulation (FAR) Part 7 and AGAR 4.701. When writing the strategy, the planner should coordinate and secure the concurrence of the CO in all significant aspects of the plan. As previously noted, the acquisition strategy is the responsibility of both the customer and the CO. An acquisition strategy template is found at Attachment 1. The requiring activity should complete the following sections: 2, as applicable; 3-6; 8, as applicable; 9-10, as appropriate/applicable. The CO is responsible for the remaining sections. The populated template records the acquisition strategy and serves to document all required levels of approval.

For Architect-Engineering services contracts, the acquisition strategy must be submitted prior to issuing a synopsis to FedBizOpps for posting.

#### **Submitting the Acquisition Strategy**

Acquisition strategies for requirements over \$5 million will be coordinated through the HCAD, and require HCAD signature prior to submission to the Department. The signature page should be faxed to 301-504-1739. Acquisition strategies should be sent via e-mail as a Word document to the Acquisition Programs & Oversight Branch. Acquisition strategies will be sent via e-mail to the Department after approval by the HCAD.

#### **Numbering Responses**

Unique number identification will be applied to each Acquisition Strategy that is sent to the Department and for each Acquisition Strategy that is approved by a Branch Chief or PAO. The following format will be used:

CAO Approval—REE-fiscal year-three digit sequence (e.g., REE-07-001)

The Acquisition Programs & Oversight Branch (APOB) will apply this sequence.

Headquarters /PAO Approval—Office or Area-fiscal year-three digit sequence (e.g., FD-07-001 or MWA-07-001)

Divisions or Area offices will apply this sequence. Copies of all approvals must be maintained and submitted to the HCAD upon requested.

## **Coordination with the HCAD and Department**

The CO will be notified via email when approval is received from the Department. The e-mail should be printed and kept as part of the file to document approval of the acquisition strategy.

## **4. TIMELINES**

Personnel must build sufficient time into their milestones in order to accommodate this review process. This includes personnel at both the customer end as well as at the acquisition end. As a reminder, this review process is a separate review process and does not take the place of any internal required Contract Review Board procedures.

The review of acquisition strategies by the CAO is done on a bi-weekly basis. The first meeting to review acquisition strategies will commence March 27, 2007 and meet every 2 weeks thereafter. The dates for the acquisition strategy reviews should also be programmed into your timelines. A calendar listing the dates for all acquisition strategy review meetings in 2007 is found at Attachment 2.

Acquisition strategies need to be submitted to the Department 10 working days prior to their bi-weekly meeting. The following milestones should be followed for approval of all required acquisition strategies. An example is provided at Attachment 3 to demonstrate how one should plan on meeting the milestone for timely submission of acquisition strategies.

<b>Departmental Approval</b>	<b>Activity</b>	<b>Business Days Required to Meet Requirement</b>
	<b>Strategy to Acquisition Programs &amp; Oversight Branch</b>	<b>1</b>
	<b>Review and Recommendation to HCAD</b>	<b>1</b>
	<b>HCAD Review</b>	<b>2</b>
	<b>Submit to Department</b>	<b>1</b>
	<b>Review of Strategy</b>	<b>10</b>
	<b>Acquisition Strategy Review Meeting</b>	<b>Bi-monthly</b>
	<b>Notification of HCAD</b>	<b>2</b>
	<b>Notification to Contracting Activity</b>	<b>1</b>
<b>Branch or Area Review</b>	<b>Review and Recommendation to the Branch Chief or PAO</b>	<b>1</b>
	<b>Branch Chief or PAO review</b>	<b>2</b>
	<b>Notification to Contracting Activity</b>	<b>1</b>

/s/ Denise Roberts for

LARRY R. CULLUMBER  
 Director  
 Acquisition and Property Division

**ACQUISITION STRATEGY**

1. Acquisition Strategy Identifier: \_\_\_\_\_  
Agency Identifier - FY - Agency  
(e.g., REE-06-0001, as determined by Agency)

2. Contracting Agency Information

Agency Name and Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Agency Point of Contact: Name: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_

Contracting Office Name and Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Contracting Officer: Name: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_

3. Please include a description of planned acquisition, including scope of work (attach), major deliverables/services, name of Agency Program/Project supported by the Acquisition.

4. List the Estimated Dollar Amount (inclusive of all options).

5. Provide the Period of Performance/Delivery Schedule.

6. What funding method is planned? (proposed funding, include type and year of funds/no year)

7. What is the Contracting Method?

a. Solicitation type (e.g., sealed bid (IFB), negotiated (RFP), request for proposals under a multiple award contract or Federal Supply Schedule, interagency agreements).

b. Small Business Program Considerations (e.g., 8(a) competitive, 8(a) non-competitive, small business set-aside, HubZone set-aside, Service Disabled Veteran owned small business, women-owned small business).

Provide a rationale and address market survey(s) conducted, if the planned acquisition will be unrestricted.

c. Extent of competition (e.g., full and open competition, competition after exclusion of sources, other than full and open competition pursuant to FAR 6.3, competition under Federal Supply Schedule, sole source set-aside, brand name specified under FSS, GWAC, multiple award or other indefinite delivery type contracts.

For brand name specific order, attach a copy of the justification as required by FAR 11.105 (See AGAR Advisory 75).

For other than full and competition pursuant to FAR Part 6.3, attach a copy of the approved justification for other than full and open competition.

d. For service contracts or task orders - if the contract or statement of work will not be performance based provide a rationale.

e. Source selection procedures

f. Contract Type (see FAR part 16) including pricing structure

g. Identify option periods, quantities or items

h. For indefinite delivery type contracts, identify the authorized users

8. For major IT investments include a copy of OMB Circular A-11, Exhibit 300, Part I, Section A, Overview (All Capital Assets), Section B, Summary of Spending (All Capital Assets) and Section C, Acquisition/Contract Strategy (All Capital Assets).

9. If the acquisition is a follow-on procurement, what is the current contract/order number(s), contractor(s) name and address and expiration date(s)?

10. Does the scope include Biobased, BioPreferred products or other green purchasing initiatives? What other acquisition issues of note should be provided?

**SUBMITTED FOR REVIEW AND APPROVAL:**

\_\_\_\_\_  
Program Manager / Project Manager

\_\_\_\_\_  
Date

\_\_\_\_\_  
Contracting Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
HCA or HCAD

\_\_\_\_\_  
Date

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RECOMMENDATION TO THE CAO:

Approve \_\_\_\_\_

Disapprove \_\_\_\_\_

Approve Subject to listed conditions \_\_\_\_\_  
Conditions:

\_\_\_\_\_  
Chief, Procurement Policy Division, OPPM

\_\_\_\_\_  
Date

\_\_\_\_\_  
Senior Procurement Executive

\_\_\_\_\_  
Date

-----  
DECISION OF THE CAO:

Approved \_\_\_\_\_

Disapproved \_\_\_\_\_

Approved Subject to the listed conditions \_\_\_\_\_  
Conditions:

\_\_\_\_\_  
Chief Acquisition Officer

\_\_\_\_\_  
Date

Attachment 2

**Acquisition Strategy Review Meetings for 2007**

March	27		
April	10	24	
May	8	22	
June	5	19	
July	3	17	31
August	14	28	
September	11	25	
October	9	23	
November	6	20	
December	4	18	

Example for using the calendar:

A CO plans to issue a solicitation on August 1, 2007. That means the CO must meet have their acquisition strategy submitted for review in time to meet the July 17, 2007 review date at the Department. The following dates are incorporated into the calendar for planning purposes:

<b>Departmental Approval</b>	<b>Activity</b>	<b>Business Days Required to Meet Requirement</b>	
	<b>Strategy to Acquisition Programs &amp; Oversight Branch</b>	<b>1</b>	<b>JUNE 26</b>
	<b>Review and Recommendation to HCAD</b>	<b>1</b>	<b>JUNE 27</b>
	<b>HCAD Review</b>	<b>2</b>	<b>JUNE 28</b>
	<b>Submit to Department</b>	<b>1</b>	<b>JULY 2</b>
	<b>Review of Strategy</b>	<b>10</b>	<b>JULY 3</b>
	<b>Acquisition Strategy Review Meeting</b>	<b>Bi-monthly</b>	<b>JULY 17</b>
	<b>Notification of HCAD</b>	<b>2</b>	<b>JULY 19</b>
	<b>Notification to Contracting Activity</b>	<b>1</b>	<b>JULY 20</b>

Per this example, the CO must have their acquisition strategy review to the Acquisition Programs & Oversight Branch no later than June 26 in order to meet their planned August 1 solicitation release.