

Subject: ACQUISITION PLANNING

- 8-95-00 Purpose
 - 10 Applicability
 - 20 Requirements and Responsibilities for Acquisition Planning
 - 30 Planning by Contracting Activities
 - 40 Preparation of the Acquisition Planning Document
 - 50 Acquisition Planning Document

8-95-00 PURPOSE

This Chapter prescribes the requirements for acquisition planning for applicable negotiated acquisitions. (For additional details relative to acquisition planning, see Subpart 307.1 of the Acquisition Manual (RHSAR)).

8-95-10 APPLICABILITY

- A. An acquisition planning document is required for all new negotiated acquisitions which are expected to exceed \$ 100,000, except the following:
 - 1. Acquisition of architect-engineer services;
 - 2. Acquisition of utility services where the services are available from only one source; and
 - 3. Acquisitions made from or through other Government agencies.
- B. An acquisition planning document is also required for all **two-**step sealed bid acquisitions expected to exceed \$ 100,000.
- C. The principal official responsible for acquisition shall prescribe acquisition planning procedures for:
 - 1. Negotiated acquisitions which are not expected to exceed \$ 100,000;
 - 2. Two-step sealed bid acquisitions which are not expected to exceed \$ 100,000; and
 - 3. All other sealed bid acquisitions regardless of dollar amount.

- D. An acquisition planning document is not required for a contract modification which either exercises an option or adds funds to an incrementally funded contract, provided there is an approved acquisition planning document in accordance with HHSAR section 307.105, and there is no significant deviation from that plan.

8-95-20 REQUIREMENTS AND RESPONSIBILITIES FOR ACQUISITION PLANNING

A. **Planning by Program and Staff Activities.** Whenever execution of a program or project requires the acquisition of property or services by contract, the program or project plan shall delineate all elements to be acquired by contract. The program or project plans include a plan and time-frame for completion action.

B. **Planning for Acquisition Actions.** Action should commence as early as possible to effect an orderly and balanced acquisition workload throughout a fiscal year. Project officers who expect to initiate acquisitions are required to discuss their requirements with the acquisition officials who will be responsible for these acquisitions to compare current staff capabilities with anticipated requirements to achieve an even distribution of fiscal year workload consistent with program needs. These discussions should result in understandings on:

1. Details of the acquisition plan;
2. Schedule for the completion of the acquisition plan;
3. Preliminary discussions on the work statement/specification, and appropriate evaluation criteria: and
4. Preliminary discussions on the content and timing of the request for contract (RFC).

8-95-30 PLANNING BY CONTRACTING ACTIVITIES

Contracting activities will coordinate with program and staff offices to ensure timely and comprehensive planning for acquisitions, timely initiation of acquisition requests or requests for contract, and instruction of program and staff offices in proper acquisition practices and methods.

8-95-40 PREPARATION OF THE ACQUISITION PLANNING DOCUMENT

The acquisition planning document serves as an advance agreement

between program and acquisition personnel by outlining the methods of how and when the acquisition is to be accomplished. It serves to resolve problems early in the acquisition cycle, thereby precluding delays in contract placement. It is developed prior to the preparation and submission of the formal request for contract to the contracting activity. The acquisition planning document is prepared jointly by the project officer and the contract negotiator, or in accordance with procedures prescribed by the principal official responsible for acquisition.

B-95-50 ACQUISITION PLANNING **DOCUMENT**

The Department does not prescribe a standard format for the **acquisition** planning document, but recommends a format similar to that in **HHSAR** section 307.105. This HHSAR section also specifies the contents for the acquisition planning document.