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PQ-2005- 02

MEMORANDUM TO ASSISTANT REGIONAL ADMINISTRATORS, PBS
1P, 2P, 3P, 4P, 5P, 6P, 7P, 8P, 9P, 10P, WP
REGIONAL REALTY SERVICES OFFICERS

THRU: ANTHONY COSTA
DEPUTY COMMISSIONER, PBS - PD

FROM: CRISTOPHER REUTERSHAN
INTERIM ASSISTANT COMMISSIONER FOR OFFICE OF
NATIONAL CUSTOMER SERVICES MANAGEMENT - PQ

SUBJECT: Acquisition Planning For Leasing

1. Purpose. This Realty Services Letter (RSL) issues revised instructions for applying acquisition planning within the leasing process in accordance with the latest GSA order on the subject. It emphasizes limited acquisition planning procedures and is the official vehicle for issuance of the on-line Limited Acquisition Plan Form.
2. Background. The GSA Office of Acquisition Policy issued GSA Order OGP 2800.1, Acquisition Planning, dated January 1, 2004. As specified in the Order, most GSA leasing actions require completion of an acquisition plan. Therefore, in response to the Order, PBS has prepared the Limited Acquisition Plan Form and Guidance to be utilized for lease acquisition.
3. Effective Date/Expiration Date. These instructions, form and guidance are effective immediately for all leasing actions meeting the criteria specified in the *Acquisition Planning* order and will expire 12 months from the date of issuance, unless extended. Specialists shall apply these instructions for ongoing acquisitions as appropriate.
4. Cancellation. PRL-85-10, *Acquisition Planning for Leasing*, dated December 19, 1985 is canceled.
5. Applicability. All real property leasing activities.
6. Instructions/Procedures. Detailed guidance is attached.
 - a. The Sample Limited Acquisition Plan Form (Guidance appears as Hidden Text) is not attached to this RSL but shall be accessed and downloaded from

<http://www.gsa.gov/leasingform>, or from GSA InSite at
<http://insite.pbs.gsa.gov/leasingform/standcla.htm>.

- b. The Office of the Chief Acquisition Officer (V) has reviewed and approved this RSL.
- c. The official version of the Limited Acquisition Plan Form and Guidance is dated January 2005. Realty Specialists shall discontinue use of any previous version.
- d. Comprehensive Acquisition Plans shall be prepared as specified in FAR Section 7.105, 7.106, and 7.107 as applicable.

Attachment

LIMITED ACQUISITION PLAN GUIDANCE

1. GSA Order OGP 2800.1, Acquisition Planning, was issued on January 1, 2004. Paragraph 7.f of the Order specifically references acquisition of leasehold interests in real property.
2. All leases, regardless of dollar value, require acquisition planning.
3. Leases over the Simplified Lease Acquisition Threshold (SLAT) must have a written acquisition plan approved by the Regional Administrator (RA)/Assistant Regional Administrator (ARA) or their designated official *prior* to issuing a Solicitation For Offers (SFO).
4. Paragraph 11 of the Order allows for a waiver of the requirement for a written plan. If the requirement for a written plan is waived, an oral plan must be presented and then summarized in writing. The written summary may be prepared after award. The RA/ARA or Designee can also waive the requirement if he/she feels the Region already has a mechanism in place that meets the criteria of the Order. (The type of mechanism can be determined on a Regional basis.) STAR does not qualify, as it does not provide the level of detail required.
5. Required Notification. The Planner or the Contracting Officer (CO) must submit the written plan or the summary of an oral plan electronically to the Office of Acquisition Policy, Office of Governmentwide Policy, within 7 days of approval to acquisitionplans@gsa.gov. The Office of Acquisition Policy does not approve the plan; however, issuance of the SFO is contingent upon receiving the RA/ARA or his/her designee's written approval of the plan.
6. Comprehensive Plans.
 - a. Required for:

Leases, including lease construction, in excess of \$50M total contract value, including options or
Complex, politically sensitive type projects of any size over SLAT.
 - b. Comprehensive Plans must have a Planning Team in place to prepare the Plan and their content must be consistent with the requirements found in FAR Section 7.105 (and 7.106 and 7.107 if applicable).

7. Limited Plans. Limited plans are necessary when the acquisition is over the SLAT and does not meet the criteria for a comprehensive plan. Lease acquisitions falling into this category include expansions, extensions, space reductions necessitating the need for a buy-out, the exercise of an un-priced, unevaluated renewal option, and lease construction. There are multiple layers for approval. The type of information which must be contained in both Limited and Comprehensive Acquisition Plans is found and referenced on pages 9 and 10 of the Acquisition Planning Order.
8. The Table on page 8 of the referenced GSA *Acquisition Planning Order* provides the approval process necessary for Leasing over the SLAT but under \$5M, and over \$5M (including options).
9. As the majority of leasing acquisition plans will in all likelihood be "Limited", the official Limited Acquisition Plan format as approved by Acquisition Policy has been provided. It is imperative that those responsible for completing the Acquisition Plans understand that they are not restricted to the amount of space provided for input and should use as much space as necessary to clearly explain the decision-making process that went into the formulation of the Acquisition Plan.
10. As part of the planning process, the Contracting Officer must hold customer discussions. Discovery of any unique customer statutory or regulatory requirement applicable to or that may affect the acquisition process must be documented in the Acquisition Plan (i.e. DOD type regulations).

LIMITED ACQUISITION PLAN
(ACQUISITION OF LEASEHOLD INTERESTS IN REAL PROPERTY)

A. ACQUISITION BACKGROUND/OBJECTIVES

1. Requiring Agency _____

Location _____

2. Agency Contact Name _____

Telephone Number _____ () - _____

3. Estimated Square Footage (RSF and USF) _____ RSF / _____ USF

4. Estimated Lease Term From: _____ To: _____

5. Lease Action:

New Requirement

Provide description of the requirement, including services, if any, to be provided by the Lessor.

Continuing Need (Expansion, Extension, Buy-Out, Renewal)

Explain (include current term, SF, rental rates, and any changes from existing lease).

New Lease Construction

Explain.

B. PLAN OF ACTION

1. Results of Market Survey of locations that will meet the agency's needs:

2. Competition:

Full and Open Competition

Other Than Full and Open Competition. *Attach approved Justification.*

LIMITED ACQUISITION PLAN
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3. Source Selection

Source Selection Type:

- Best Value
 Lowest Price/Technically Acceptable
 Other

Evaluation Factors:

4. New Requirement or Continuing Need

Project # or Current Lease # _____

Estimated Annual Rental \$ _____ USF / _____ RSF

(Total Annual Rent) \$ _____

Estimate Derived From

- STAR
 Other. *Explain how estimate was derived.*
-

Funding Availability

Year 1

- Yes
 No

Projected Total Contract Value \$ _____

5. Environmental/Energy Conservation Objectives:

List clauses that will be included in the SFO, or provide justification for not including all "Green" lease clauses in the SFO.

6. Other Objectives (i.e., SBTA actions, Customer Regulatory Requirements [i.e., Title 10]):

Describe.

7. Discuss any conditions peculiar to the lease action [i.e., inclusion of evaluated renewal or expansion option(s)]:

LIMITED ACQUISITION PLAN
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8. Lease Administration:

C. MILESTONE EVENTS

	<u>ESTIMATED</u>	<u>ACTUAL</u>
1. Space Request Received	_____	_____
2. Market Survey	_____	_____
3. Issuance of Solicitation	_____	_____
4. Offers Due	_____	_____
5. Final Proposal Revisions Due	_____	_____
6. Lease Award	_____	_____
7. Lease Effective	_____	_____
8. Occupancy	_____	_____

D. REVIEW AND APPROVALS

Prepared by: _____ Date _____
 Typed Name, Realty Specialist Date _____

Approved by: _____ Date _____
 Typed Name, Contracting Officer Date _____

Approved by: _____ Date _____
 Typed Name, R.E. Director/Designee Date _____

Approved by: _____ Date _____
 Typed Name, ARA/Designee Date _____

Approved by: _____ Date _____
 Typed Name, RA/Designee ** Date _____

** Submit to:
 Office of Acquisition Policy
 Office of Governmentwide Policy
 at acquisitionplans@gsa.gov
 within 7 days of approval.