

INTEGRATING ACQUISITION PLANNING PROCESSES — AN OVERVIEW



Guiding Principles

- Acquisition planning benefits from integrating independent planning processes and a team approach that includes appropriate representation from all intended.

REFERENCES

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| 1. FAR Part 7 | Acquisition Planning |
| 2. FAR Part 34 | Major System Acquisition |
| 3. Acquisition Letter | 2005-08R, Small Business Programs |
| 4. Acquisition Guide | Chapter 7.1, Acquisition Planning |
| 5. Acquisition Guide | Chapter 42.5, Contract Management Planning |
| 6. DOE O 580.1 | Department of Energy Property Management Program |
| 7. DOE O 413.3 | Program and Project Management for the Acquisition of Capital Assets |

❑ OVERVIEW

The purpose of this chapter is to provide information and guidance on the development and integration of associated acquisition planning documents and their influence on the establishment of the acquisition plan in order to improve the acquisition planning process.

❑ BACKGROUND

The Department of Energy awards billions of dollars each year in contracts. Strategically managing our internal control processes is an integral part of successfully achieving the acquisition mission. Multiple standalone acquisition execution documents (e.g., CMP, PEMP, etc.), and activities (e.g., source selection, property management, small business advance planning acquisition, etc.) are required to ensure various mission related tasks and responsibilities are accomplished. These must all integrate and work together during the acquisition process. As discussed in Chapter 7.1, it is essential that there be linkage between all major acquisition planning documents and events that define various individual actions within an acquisition, such as ensuring that organizational property management officers (OPMO) participate as team members in acquisition planning, making certain that personal property life-cycle-management processes are discussed and incorporated into each acquisition plan as appropriate, and ensuring that Advanced Planning Acquisition Team (APAT) team members review acquisition strategies of new procurements in the developmental stage.

❑ WHAT ARE THE MAJOR ACQUISITION PLANNING DOCUMENTS AND ACTIVITIES AVAILABLE?

Major Acquisition Planning documents and activities within DOE are those functions that translate requirements into specific actions against mission, performance, and budget.

- **The Site Utilization and Management Plan (SUMP)** describes the site from the present into the future, such as remediation, closure, or continuation of an existing or modified mission.
- **The Contract Management Plan (CMP)** provides a strategy for the coordinated involvement of the members of the contract management team in managing the contract throughout its life.

- **The Source Evaluation Board Report (SEBR)** provides reporting information consistent with the Request for Proposal (RFP), substantiating specific strengths, weaknesses, deficiencies, and risk from each offeror to be considered and which may include a recommendation for selection if required by the Source Selection Official.
- **The Performance Evaluation Measurement Plan (PEMP)** describes a strategy for incorporating performance objectives, measures, and expectations allocated to specific contract tasks, reflecting their priority and value to the Government, and determining the fee to be earned under the contract.
- **The Advanced Planning Acquisition Team (APAT)** identifies opportunities for small business participation at the prime contracting level. APAT review may be conducted prior to the development and execution of the acquisition plan.
- **Property Management Execution** provides that the Organizational Property Management Officer (OPMO) be involved in planning, acquisition, control, management and disposal of personal property.
- **Information Technology (IT) Execution** ensures that all IT requirements that meet or exceed \$500,000 are to be forwarded to the Office of the Chief Information Officer (OCIO) for review and approval prior to acquisition planning. (Office of the Chief Information Officer Program Budget Decision (PBD) CIO-07-1).

Other acquisition planning documents and activities required to create a complete acquisition plan, such as, competition determination, make or buy, contract type, contract funding, security consideration, etc. are described later.

WHAT IMPACT DO THEY HAVE ON ACQUISITION PLANNING?

The acquisition planning process integrates related actions for fulfilling and managing an agency need. In addition, the acquisition plan assures that there is corporate agreement for strategy planning, organizing, and quality. Major documents and activities in the acquisition plan provide a complete view of the acquisition and the procedures needed to accomplish the mission. Effective integration and use of these documents and activities serve as a tool for assessing how the acquisition adheres to applicable policies, processes, procedures, and standards of quality.

WHAT STRATEGIES ENSURE ACQUISITION PLANNING PROCESS INTEGRATION?

Strategies for managing the acquisition planning process include:

1. Establishing a specific objective at the beginning. This allows contracting officers to better understand the requirement and involve other appropriate team members in meaningful planning.
2. Ensuring that all team members (e.g., legal, property, technical, contract management buddy, etc.), are actively involved in the planning and formulation process. Lack of early involvement may hinder the timely resolution of issues as they occur.
3. Automation of routine tasks using established corporate tools and processes (e.g., Strategic Integrated Procurement Enterprise System [STRIPES]). This may add more rigor to processes and procedures by improving quality consistency.
4. Using information and data from project specific source documents, such as, the SUMP and Acquisition Strategy, ensuring a connection between concept and implementation, thereby ensuring the execution of corrective measures when unplanned incidents arise.
5. Identifying roles and responsibilities early in the planning process and recognizing that these roles and responsibilities may change.
6. Affording offerors the time and opportunity to become knowledgeable of the requirements in order to propose a competitive solution.

Acquisition Plan Integration

