

PART 7 — ACQUISITION PLANNING

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SUBPART 7.1 — ACQUISITION PLANS

7.102 Policy.

(S-100) General.

In general, there are two levels of acquisition planning:

(a) preparing the Overall Acquisition Strategy for the contracting activity's total anticipated future workload (see (S-101) below; and

(b) preparing a Formal or Informal Acquisition Plan, as appropriate, for an individual acquisition plan (see 7.102 (S-102) and (S-103) below).

(S-101) Overall Acquisition Strategies.

(a) Prior to the beginning of each fiscal year, each contracting activity shall develop a written Overall Acquisition Strategy (OAS) covering all anticipated contracts over \$1 million. The OAS may be based on historical trends and must include all known work, as well as reasonably expected work. The OAS shall be updated in the middle of the fiscal year and when major new projects are identified. Short notice acquisitions will be added to the OAS at the next regular update and will not delay processing the acquisition.

(b) The OAS shall address and document all major technical and business issues. Anticipated workload will be compared to the remaining capacities of ongoing contracts to determine the need to award new contracts. Any new contracts needed should be scheduled and their terms established based on a case-by-case analysis considering factors such as the following:

- (i) type of work,
- (ii) anticipated workload,
- (iii) effects on competition,
- (iv) most effective contract type (including, for example, fixed-price, cost-reimbursement, incentive, and indefinite delivery contracts (IDCs)),
- (v) overall mix of contract sizes, and
- (vi) the impact on small business participation (see (c) below) and on other business and socio-economic concerns.

(c) The OAS shall assure a mix of large and small contracts, including IDCs of various types and sizes, to provide meaningful opportunities for small business firms to participate in the work. The OAS shall incorporate and include a copy of the Small Business Forecast required annually by letter by the DoD and Army Directors, SADBUI.

(d) See 16.5 and 36.601-3-90 for additional guidance concerning IDCs.

(S-102) Formal Acquisitions Plans.

(a) See FAR 7.105 and DFARS 207.105, which contain requirements for the contents of Formal Acquisition Plans. Formal Acquisition Plans submitted to the PARC for approval shall include a copy of the completed DD

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Form 2579, Small Business Coordination Record, as an attachment.

(b) Except as provided in (c) below, a Formal Acquisition Plan shall be prepared for any acquisition (for any contract or for any program involving multiple contracts):

(i) for services, supplies, or development, when the total cost of all contracts for the program is estimated at \$15 million or more for any fiscal year or at \$30 million or more for all years, unless another threshold is prescribed in (ii) through (vi) below;

(ii) estimated at \$15 million or more for all years, including options, or \$5 million or more for any one year for A-E services,

(iii) for a program estimated at \$15 million or more for all years, that packages or consolidates discrete projects, including construction,

(iv) determined by the contracting officer to be nationally significant, such as, impacting a major USACE initiative, raising serious or unique environmental matters, implementing a deviation from the FAR, and/or concerning significant Congressional or political interest beyond normal constituent service,

(v) that extends beyond the MSC's geographical boundary or is nationwide (*note*: any Formal Acquisition Plan prepared to comply with this subsection (b) (v) shall include the statement required by paragraph 5 b (5) of ER 5-1-10, Corps-Wide Areas of Work Responsibility), or

(vi) if directed by HQUSACE.

(c) Only the requirements in (b) (iv) and (vi) above apply to a single, fixed price contract for a discrete construction project (The requirements in (b) (i), (ii), (iii), and (v) above do not apply).

(d) The project management plan required in ER 5-1-11, Business Process, paragraph 7.b(2)(a), shall include the Formal Acquisition Plan for that project.

(S-103) Informal Acquisition Plans.

An informal Acquisition Plan shall be prepared according to local policy for all acquisitions not requiring a Formal Acquisition Plan. The documentation and level of detail in the Informal Acquisition Plan will be commensurate with the value, complexity, and significance of the acquisition. The project management plan required by ER 5-1-11, Business Process, paragraph 7.b(2)(a), shall include the Informal Acquisition Plan for that project.

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(h) (S-100) Reviewing and Approving Acquisition Plans and Revisions.

(a) Each OAS and Formal Acquisition Plan shall be fully coordinated with all staff elements, including the Deputy for Small Business. If coordination results in an unresolved difference of opinion, elevate the disagreement through command channels.

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(b) The MSC Commander is the approval authority for any district OAS. HQUSACE is the approval authority for any OAS prepared by a center or HECSA.

(c) The PARC, HQUSACE, is the approval authority for all Formal Acquisition Plans.

(d) Local procedures shall establish the approval authority for Informal Acquisition Plans.

(e) Changes to an Acquisition Plan shall require approval at the same level as the original plan.

(h) (S-101) Acquisition Strategy Panels.

(a) Each district, center and HECSA shall establish an Acquisition Strategy Panel, which may be an existing group, such as the Project Review Board (PRB), provided it includes all staff elements (see S-100 above). The Panel shall be responsible to the District or Center Commander to assure that the requirements of 7.102 (S-101) above are met.

(b) The Panel may establish separate, subordinate boards, if appropriate, to review requirements for breakout analysis of bundled requirements, set asides, as well as the appropriate balance of acquisition methods, contract types and contract sizes.