

# TMA Procedures, Guidance, and Information (PGI)

## TMA PGI 207 – ACQUISITION PLANNING

(Revised May 24, 2012)

### 207.1 – Acquisition Plans

- (1) Acquisition planning is the process of developing a strategy to fulfill a requirement, and is essential to the proper procurement of both supplies and services. The Federal Acquisition Regulation (FAR) mandates acquisition planning for *all* acquisitions ([FAR 7.102](#)), but only certain acquisitions require written Acquisition Plans (AP). Written APs must be approved in accordance with the procedures and authorities outlined herein.
- (2) The Project Manager (PM) is responsible for the overall acquisition planning process, including the development and coordination of written APs, but may delegate specific AP development duties. Acquisition planning is a collaborative process so the PM is encouraged to assemble an integrated product team early in the process to solicit necessary input from technical, financial, logistics, program, contracting, and other experts.
- (3) In accordance with [FAR 7.102](#) and [DFARS 207.103](#), written APs are required as stated in Table 1.

Type of Acquisition	Estimated Dollar Value
<b>Development (see FAR 35.001)</b>	<b>≥ \$10 million</b>
<b>Products or services*</b>	<b>≥ \$25 million in any single Fiscal Year</b>
<b>Products or services*</b>	<b>≥ \$50 million in Total Program Costs</b>
<b>Cost reimbursable contracts**</b>	<b>All</b>
<b>Any other acquisition considered appropriate by the Department or Agency</b>	
<i>*The acquisition of services requires some unique planning and process steps even for those anticipated procurements below the AP thresholds. Requiring activities should review the TMA acquisition of services guidance for more information on these unique services requirements.</i>	
<i>** Recent changes to FAR Sections <a href="#">7.102</a>, <a href="#">16.301-2</a>, and <a href="#">16.301-3</a> require APs for cost reimbursement contracts, regardless of dollar value. The Head of Agency must ensure these APs are approved at least one level above the CO. AM&amp;S is actively pursuing clarification and possible delegation of approval authority from the TMA Head of Agency (Director, Defense Procurement and Acquisition Policy) to ensure AP approval authorities are commensurate with the dollar value and complexity of the acquisition. AM&amp;S will provide direction to the TMA acquisition workforce and will revise this guide accordingly when additional information is available. Pending these additional developments, the CO for any planned acquisition contemplating a cost reimbursement contract is advised to consult with the Contract Policy and Pricing Branch for guidance before finalizing APs.</i>	

Table 1: Requirements for Written APs

- (4) Written APs are required irrespective of the contracting method or vehicle utilized, so actions utilizing non-TMA contracting offices, the Federal Supply Schedules, or other Government-wide Acquisition Contracts must still have written APs in accordance with Table 1.
- (5) Each AP must be numbered in a consistent manner and retain the original assigned number throughout the life of the acquisition.

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- a. The Contract Policy and Pricing Branch (CP&PB) is responsible for managing and maintaining a numbered log for all TMA APs. To request an AP number or an AP revision number, the PM and/or the Contracting Officer (CO) should contact CP&PB administrative support at (303) 676-3453.
  - b. AP revisions will be numbered as a supplement to the original AP number, ensuring proper tracking to the original AP while also indicating that revisions have been made, for example, “AP No.: 0001, Rev A.”
- (6) All written APs must be approved by the Director, Defense Procurement and Acquisition Policy (DPAP) in his/her capacity as the TMA Head of the Agency.
- a. The CO is responsible for scheduling any required Boards of Review (BOR), facilitating the reviews, and collaborating with the PM to resolve BOR recommendations. Following resolution of recommendations, the PM and CO will route the AP for concurrence and approval signatures.
  - b. The PM and CO will sign the AP prior to obtaining concurrence and signatures from the following personnel, and in the order listed:
    - i. Program Executive Officer (as applicable);
    - ii. Chief Functional Officer (as applicable);
    - iii. Contract Office Chief/Director;
    - iv. Director, Small Business Programs;
    - v. Competition Advocate;
    - vi. Head of the Contracting Activity.
  - c. After obtaining the signatures specified in 6(b), the CO will provide the documents to CP&PB for coordination with DPAP. CP&PB will directly manage and facilitate the DPAP approval process.
  - d. The CO may not release a solicitation before the AP has been approved by Director, DPAP in accordance with paragraph (6), above.
- (7) The CO will retain the original AP, bearing all approval signatures, in the contract file and will provide CP&PB with a copy of the approved AP.

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- (8) TMA AM&S has published an AP Guide describing responsibilities and procedures for the preparation, revision, submission, and approval of APs, as well as an AP Template outlining required AP content and describing what information to include in each section of the AP.