

CHANGE REQUEST COVER SHEET

Change Request Number: 13-36

Date Received: 1/14/2013

Title: Procurement Planning - Market Analysis

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Policy OR Guidance: Policy

Section/Text Location Affected: 3.2.1 Procurement Planning

Summary of Change: Clarifies Market research and analysis requirements and revises market research templates.

Reason for Change: To improve market analysis for acquisitions

Development, Review, and/or Concurrence: HQ contracting division managers, ACQ-1, AMQ-1, AAP-110 and AGC.

Target Audience: Contracting officers, specialists and program offices.

Potential Links within FAST for the Change: Procurement Forms and Samples and Templates:

http://fast.faa.gov/ProcurementToolboxForms.cfm?CFID=5679236&CFTOKEN=97492740&p_title=Functions

http://fast.faa.gov/ProcurementToolboxTemplates.cfm?CFID=5679236&CFTOKEN=97492740&p_title=Functions

Briefing Planned: No

ASAG Responsibilities: Approve

Potential Links within FAST for the Change: Procurement Forms and Samples and Templates:

http://fast.faa.gov/ProcurementToolboxForms.cfm?CFID=5679236&CFTOKEN=97492740&p_title=Functions

http://fast.faa.gov/ProcurementToolboxTemplates.cfm?CFID=5679236&CFTOKEN=97492740&p_title=Functions

Links for New/Modified Forms (or) Documents (LINK 1) [null](#)

Links for New/Modified Forms (or) Documents (LINK 2) [null](#)

Links for New/Modified Forms (or) Documents (LINK 3) [null](#)

SECTIONS EDITED:

Acquisition Management Policy:

Section 3.2.1.1 : Applicability [\[Old Content\]](#)[\[New Content\]](#) [\[RedLine Content\]](#)

Acquisition Management Policy:

Section 3.2.1.2.1 : Market Analysis [\[Old Content\]](#)[\[New Content\]](#) [\[RedLine Content\]](#)

Acquisition Management Policy:

Section 3.2.1.2.2 : Procurement Plan [\[Old Content\]](#)[\[New Content\]](#) [\[RedLine Content\]](#)

Acquisition Management Policy:

Section 3.2.1.2.3 : Consideration of Agency Wide Contracts [\[Old Content\]](#)[\[New Content\]](#)
[\[RedLine Content\]](#)

SECTIONS EDITED:

Section 3.2.1.1 : Applicability

Old Content: Acquisition Management Policy:

Section 3.2.1.1 : Applicability

Planning requirements apply to all FAA procurements, including interagency agreements, with the exception of real property, utilities, and those procurements using the commercial and simplified purchase method.

New Content: Acquisition Management Policy:

Section 3.2.1.1 : Applicability

Written procurement plans are required for all FAA procurements except: real property, utilities, purchase card transactions and transactions less than \$25,000. The specific content of a procurement plan may vary depending on the complexity of the procurement. The procurement planning templates in AMS must be used. Template A must be used for all simplified and commercial procurements and Template B must be used for all complex and non-commercial procurements.

Red Line Content: Acquisition Management Policy:

Section 3.2.1.1 : Applicability

~~Planning requirements apply to~~ *Written procurement plans are required for* all FAA procurements *except: real property, utilities, including purchase card transactions and transactions interagency less agreements than \$25,000. with the exception* *The specific content of real property, procurement utilities, plan and those may vary procurements depending on using the complexity of the procurement. The procurement planning templates in AMS must be used. Template A must be used for all simplified and commercial procurements and simplified Template purchase B must be used for method all complex and non-commercial procurements.*

Section 3.2.1.2.1 : Market Analysis

Old Content: Acquisition Management Policy:
Section 3.2.1.2.1 : Market Analysis

For procurements not addressed in a program with an approved implementation strategy and planning document, the market analysis is to initiate industry involvement, develop and refine the procurement strategy, obtain price information, determine whether commercial items exist, determine the level of competition, identify market practices, or obtain comments on requirements. The magnitude and degree of formality of the market analysis should be proportionate to the contemplated procurement. The market analysis may be as simple as a telephone call or as formal as a market survey advertisement to learn of industry capabilities. All market analyses, formal or informal, should be appropriately documented.

New Content: Acquisition Management Policy:
Section 3.2.1.2.1 : Market Analysis

The purpose of market analysis is to initiate industry involvement, develop and refine the procurement strategy, obtain price information, determine whether commercial items exist, determine the level of competition, identify market practices, or obtain comments on requirements. The magnitude and degree of formality of the market analysis should be proportionate to the contemplated procurement. The market analysis may be as simple as a telephone call or as formal as a market survey advertisement to learn of industry capabilities. All market analyses, formal or informal, should be appropriately documented.

Red Line Content: Acquisition Management Policy:
Section 3.2.1.2.1 : Market Analysis

~~For procurements not addressed in a program with an approved implementation strategy and planning document,~~
~~the purpose of~~ the market analysis is to initiate industry involvement, develop and refine the procurement strategy, obtain price information, determine whether commercial items exist, determine the level of competition, identify market practices, or obtain comments on requirements. The magnitude and degree of formality of the market analysis should be proportionate to the contemplated procurement. The market analysis may be as simple as a telephone call or as formal as a market survey advertisement to learn of industry capabilities. All market analyses, formal or informal, should be appropriately documented.

Section 3.2.1.2.2 : Procurement Plan

Old Content: Acquisition Management Policy:
Section 3.2.1.2.2 : Procurement Plan

A plan for each contemplated procurement or class of procurements should address the significant considerations of the procurement action. A procurement plan may cover more than one contract. The procurement plan represents the service organization agreement for conducting the procurement. For less complex procurements, procurement plans are not required if deemed unnecessary by the service organization.

The following alternatives are for procurements not addressed in an implementation strategy and planning document.

New Content: Acquisition Management Policy:

Section 3.2.1.2.2 : Procurement Plan

A plan for each contemplated procurement or class of procurements should address the significant considerations of the procurement action. A procurement plan may cover more than one contract. The procurement plan represents the service organization agreement for conducting the procurement. See paragraph 3.2.1.1 for documentation requirements.

Red Line Content: Acquisition Management Policy:

Section 3.2.1.2.2 : Procurement Plan

A plan for each contemplated procurement or class of procurements should address the significant considerations of the procurement action. A procurement plan may cover more than one contract. The procurement plan represents the service organization agreement for conducting the procurement. ~~For less~~See paragraph ~~complex procurements, procurement plans are not required if deemed unnecessary by the service organization~~3. ~~The following alternatives are~~2.1.1 for ~~procurements not addressed in an implementation strategy and planning~~documentation ~~document~~requirements.

Section 3.2.1.2.3 : Procurement Strategy Meeting

Old Content: Acquisition Management Policy:

Section 3.2.1.2.3 : Procurement Strategy Meeting

As an alternative to a formal written procurement plan and its associated approvals, a Procurement Strategy Meeting (PSM), which includes representatives of those organizations with a vested interest in the contemplated procurement, may be held. Approval of the PSM presentation constitutes approval of the procurement approach. Minutes from a PSM may be substituted for a written procurement plan. The presentation should address all of the items that would have been addressed in a procurement plan for the contemplated requirement. The service organization should consider the dollar value, complexity, organizational issues, and other factors to determine whether a higher-level official should chair the meeting and approve the PSM presentation. A presentation should not be substituted for a written procurement plan when the service organization determines that a procurement plan is required or a single source procurement is appropriate.

The service organization determines whether a written procurement plan is needed for each procurement or a related group of procurements. Consideration should be given to complexity, need for organizational agreement, risk, significance of the procurement, and, to a lesser extent, dollar value and schedule requirements. The specific content of a procurement plan may be different for each procurement, depending on the complexity, organizations involved, and other factors.

Changes to the procurement plan should be made as changes in the needs of the procurement occur. Changes to the procurement plan are approved at the service organization level.

New Content: Acquisition Management Policy:

Section 3.2.1.2.3 : Consideration of Agency Wide Contracts

Agency Wide Contracts shall be used to the maximum extent possible. The procurement plan shall document which agency wide contracts were considered and include the rationale if an agency wide contract is not planned.

Red Line Content: Acquisition Management Policy:

Section 3.2.1.2.3 : ~~Procurement Strategy Meeting~~ Consideration of Agency Wide Contracts

~~As Agency an alternative to a formal written procurement plan and its associated approvals, a Procurement Strategy Meeting (PSM), which includes representatives of those organizations with a vested interest in the contemplated procurement, may be held. Approval of the PSM presentation constitutes approval of the procurement approach. Minutes from a PSM may be substituted for a written procurement plan. The presentation should address all of the items that would have been addressed in a procurement plan for the contemplated requirement. The service organization should consider the dollar value, complexity, organizational issues, and other factors to determine whether a higher level official should chair the meeting and approve the PSM presentation. Wide A presentation Contracts shall should not be substituted for a written procurement plan when the service organization determines that a procurement plan is required or a single source procurement is appropriate. The service organization determines whether a written procurement plan is needed for each procurement or a related group of procurements. Consideration should be given used to complexity, need for organizational agreement, risk, significance of the procurement, and, to a lesser maximum extent, dollar value and schedule requirements possible. The specific content of a procurement plan may be different for shall each document procurement, depending which on the agency wide complexity, contracts organizations were involved, considered and other factors. Changes to the procurement plan should be made as changes in the needs of the procurement occur. Changes include to the procurement plan are approved at the service organization level rationale if an agency wide contract is not planned.~~
