**PROCUREMENT PLANNING TEMPLATE**

**FOR OTHER THAN SIMPLIFIED ACQUISITIONS**

**TEMPLATE B**

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| **Program/Project Title:** |  |
| **Contracting Officer:** |  |
| **Contracting Specialist:** |  |
| **Program Office/Contracting Officer Representative (COR):** |  |

# PROCUREMENT BACKGROUND

1. **Description of Requirements/Statement of Need. *[Summarize supplies,* *construction, or services to be provided.* *Please note that if requirements include* *information technology over the AMS risk threshold (i.e. $250k) CIO approval is required].***

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1. **Background and Contracting History. *[Describe contracting history of exact or similar requirement, including previous contract type and dollar value].***

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1. **Estimated Dollar Value (including options): *[Please note that if estimated dollar value is over $15 MIL CFO approval is required].***

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1. **Funding. *[Describe type and availability of funding, expiration of funds and any statutory limits, etc.].***

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1. **Delivery or Performance Period. *[Describe delivery or performance period requirements including options]*.**

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# PLAN OF ACTION

1. **Market Research Results/Interested Sources. *[Discuss results of market research (number of sources that responded, size status of each source, results of FAA review). Based on market research, do we believe adequate competition may be obtained, can the work be set-aside for a small business competition? Market Research documentation must be included as part of the procurement plan/contract file to fulfill the requirements of this paragraph].***

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1. **Acquisition Approach.** Address the following:
2. **Basis of award (single source, competition, set-aside**). ***[Discuss the extent of competition in past solicitations. Based on the market survey for this procurement, discuss the basis of award and the rationale which supports that decision. Address considerations given to small business, small disadvantaged business, and service-disabled veteran-owned small business, full and open competition. If a single source procurement is planned, provide the rationale].***

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1. **Contract type**. ***[Identify the type of contract contemplated and any required approvals for the stated contract type. (i.e., COCO approval for Multiple Award Contracts, T&M or LH with period of performance > 5 years, etc.]***

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1. **Rationale for not complying with the Sustainable Acquisition Requirements. *[State whether the template was completed and inserted in the contract file (if applicable)].***

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1. **Milestones. *[Attach the milestone schedule produced in PRISM]***.
2. **Consideration of Agency Wide Contracts.** ***[Describe the extent to which the use of Agency Wide Contracts was considered and include the rationale if an agency wide contract is not planned].***

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1. **Consideration of Risk Management and Contract Structuring Tools for Major Acquisitions[[1]](#footnote-1)**. ***[If applicable, describe the extent to which the use of various acquisition approaches (i.e. modular contracting, advisory multi-step acquisition, and competitive prototyping) was considered in breaking large acquisitions into smaller, more manageable modules].***

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1. **Coordination with Small Business Program (AAP-20) Staff. *[The Small Business Set-Aside Determination and Coordination form must be a part of the procurement file]****.*

# COORDINATION/APPROVAL

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| Service Organization Official |  | Date |

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| Contracting Officer (CO) |  | Date |

1. A “Major acquisition” is a capital project that requires special management attention because of its: (1) importance to an agency’s mission; (2) high development, operating, or maintenance costs; (3) high risk; (4) high return; or (5) significant role in the administration of an agency’s programs, finances, property, or other resources. [↑](#footnote-ref-1)