**PROCUREMENT PLANNING TEMPLATE**

**for SIMPLIFIED ACQUISITIONS\***

**TEMPLATE A**

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

# Procurement Background

1. **Description of Requirement/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. **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:** 
   1. ***[The following sources were used to conduct market research]*.**

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|  | BETASAM/SAM.gov |
|  | Searched GSA/FSS (GSA Advantage); |
|  | Searched Unicor; |
|  | Searched AbilityOne; |
|  | Searched SAM; |
|  | Searched previous purchases of similar/identical acquisitions; |
|  | Searched the Internet; |
|  | Contacted SBA; |
|  | Contacted National Association of Women Business Owners; |
|  | Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**What was done to validate the sources provided by the requiring office?**

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**Provide rationale for the vendors to use in the competition.**

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* 1. **Results of Market Research. *[Based on the market research for this procurement, discuss the basis for award and the rationale which supports that decision. The following must be included within the documentation:***

1. ***Will the procurement be competed, single source, or directed award (Socially and Economically Disadvantaged Business [SEDB]) 8(a), Service-Disabled Veteran Owned Small Business (SDVOSB), Woman-Owned Small Business [WOSB], Economically Disadvantaged Women-Owned Small Business [EDWOSB], Historically Underutilized Business Zone [HUBZone] small business? Explain rationale for the decision based on results of the market research.***
2. ***Will the procurement be set aside for an SEDB (8[a]) SDVOSB, WOSB, EDWOSB, HUBZone small business, or Small Disadvantaged Business (SDB)? Explain rationale for the decision based on results of the market research.***
3. ***If applicable, will the procurement be brand name mandatory or brand name or equal? Explain rationale for the decision based on the results of the market research].***

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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 unless a determination has been made to award a SEDB 8(a) SDVOSB, WOSB, EDWOSB, HUBZone small business, or SDB or a small business if no SEDB 8(a), SDVOSB, WOSB, EDWOSB, HUBZone small businesses, or SDB that are competitive in terms of market prices, quality, and delivery can be identified and the estimated value of the procurement is less than $250,000. If so, specify NAICS and business size standard].***

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1. **BPA Determination & Approval for Multiple-Award BPA (if applicable). *[The determination and/or approval must be documented in the procurement file (if applicable)]****.*

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1. **Milestones. *[Attach the milestone schedule if applicable]*.**

# Coordination/Approval

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|  |  |  | (As Applicable) |
| Service Organization Official (SOO) |  | Date |  |

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| Contracting Officer (CO) |  | Date |

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