

Procurement Strategy and Property

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Procurement Strategy and Property

FAR 1.102 states the Acquisition Team consists of all participants in the Government acquisition including not only representatives of the technical, **supply**, and procurement communities, but also the customers they serve, and contractors who provide the products and services.

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“Acquisition” means the acquiring by contract with appropriated funds of supplies or services (including construction) by and for the use of the Federal Government through purchase or lease, whether the supplies or services are already in existence or must be created, developed, demonstrated, and evaluated. Acquisition begins at the point when agency needs are established and includes the description of requirements to satisfy agency needs, solicitation and selection of sources, award of contracts, contract financing, contract performance, contract administration, and those technical and management functions directly related to the process of fulfilling agency needs by contract.

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“Acquisition planning” means the process by which the efforts of all personnel responsible for an acquisition are coordinated and integrated through a comprehensive plan for fulfilling the agency need in a timely manner and at a reasonable cost. It includes developing the overall strategy for managing the acquisition.

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- **Annual Procurement Plan Developed** - Technology managers work with technical and procurement personnel to develop an "Annual Procurement Plan" by April 30th for the next fiscal year. The technology manager, the technical division director, and the Procurement team leader meet periodically to discuss planned work for the upcoming year as well as changes/updates that arise during the year.

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- **Technology Manager, Division Director, and Procurement Team Leader discuss and refine Requirements Document** -
The technical division director and the Procurement team leader meet with the technology manager to finalize the RD and they determine if the action is a "major" procurement. A major procurement is defined as having a high dollar value, a high degree of program complexity, and/or a high level of political sensitivity (e.g., all broad-based solicitations). Upon completion, the RD is signed by the technical division director and Procurement team leader, and serves as the initiating document for preparation of the Procurement Strategy Document (PSD). A copy of the RD remains with the solicitation file.

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- **Team Leader Confirms Contract Specialist** - Procurement team leader confirms the contract specialist, who generally is already identified in the Annual Procurement Plan.

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- **Project Manager and Specialist jointly develop Procurement Strategy Document** - The project manager and contract specialist develop a draft Procurement Strategy Document (PSD) incorporating basic program objectives and other relevant information known at this point. The draft PSD is forwarded for discussion at the procurement strategy coordination meeting. A PSD is to be used for all new (both competitive and noncompetitive) acquisition and financial assistance RD&D as well As site-support-services actions (excluding modifications, simplified acquisitions, site-support-services tasks, and breakout awards).

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Initiate Procurement Strategy Meeting – the contract specialist initiates a procurement strategy coordination meeting, which is to include representatives from Project Management, Acquisition and Assistance, Technology Management, Legal Office, Public Affairs, and other representatives as per listed in the procurement strategy document, such as NEPA, ES&H, and Property.

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Conduct Procurement Strategy Meeting –
A Procurement Strategy Coordination Meeting involving representatives listed on the Procurement Strategy Document is held to discuss and resolve issues in the document.

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- **PSD Finalized and Distributed to Representatives and Director** - The contract specialist finalizes and distributes the PSD, a copy of which remains with the solicitation file. Note: When the contract specialist forwards the electronic PSD file to the Director's Office, the AD for the Office of Institutional and Business Operations and the AD for the appropriate Technology Management Office are to receive a copy. One of the outputs of the Procurement Strategy Coordination meeting is to be a milestone schedule, which should be jointly developed by the contract specialist and the project manager.

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- **Procurement Package Received, Specialist Develops Solicitation** - After receipt of a complete procurement package, the contract specialist, in cooperation with the project manager, is responsible for developing the solicitation.

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Independent Review Process – the contract specialist initiates the independent review process, which includes the reviewing of the solicitation for the proper property clauses, property reporting requirements, and special conditions.

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- **Review/Approval of Overall Package** - Prior to issuing, all solicitations are reviewed and Approved by appropriate personnel in accordance with the Independent Review procedures. Reviewers Include the Legal Office, the project manager, Procurement, and Property.

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- **2 Days Prior to Issuance** - The contract specialist electronically notifies the Office of the Director, the technology manager, the project manager and Public Affairs at least two days prior to issuance of the solicitation.

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- **Issue Solicitation** - The contract specialist provides the solicitation electronically to Public Affairs for posting on the Internet.

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- **Proposals Received; Forwarded for Technical/Cost Evaluation** - Proposals are received, processed, and forwarded to the project manager for technical and cost evaluations.

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- **Develop Findings; Apply Program Policy Factors; Develop Preliminary Recommendations** - The project manager recommends application of program policy factors (if applicable) and develops preliminary recommendations. Note: If the action is a competitive (FAR) procurement, competitive range is established by the contracting officer at this point.

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- **Formulate Recommendations** - The project manager formulates recommendations and solicits Legal and ex-officio input as appropriate. Technology managers may be advisors on the application of program policy factors but do not participate as voting members on technical evaluation panels.

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- **Develop Selection Statement** - The Source Selection Authority prepares the Selection Statement and obtains necessary concurrences.

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- **SSA Makes Selection or Approves JOTFOC/DNCFA** - The Source Selection Authority (SSA) renders the selection decision and signs the Selection Statement. If the action is noncompetitive, the contract specialist will initiate the review and approval of the Justification for Other Than Full and Open Competition (JOTFOC, for acquisition) or the Determination for Non-Competitive Financial Assistance (DNCFA, for financial assistance).

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- **Initiate Request for Congressional Notification(s)** - The contract specialist initiates request for Congressional Notification(s).

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- **Issue Letters to Successful and Unsuccessful Offerors** - The contract specialist, in conjunction with technical representatives (preferably reviewers of the proposal) and possibly a technology management representative, debriefs unsuccessful offerors.

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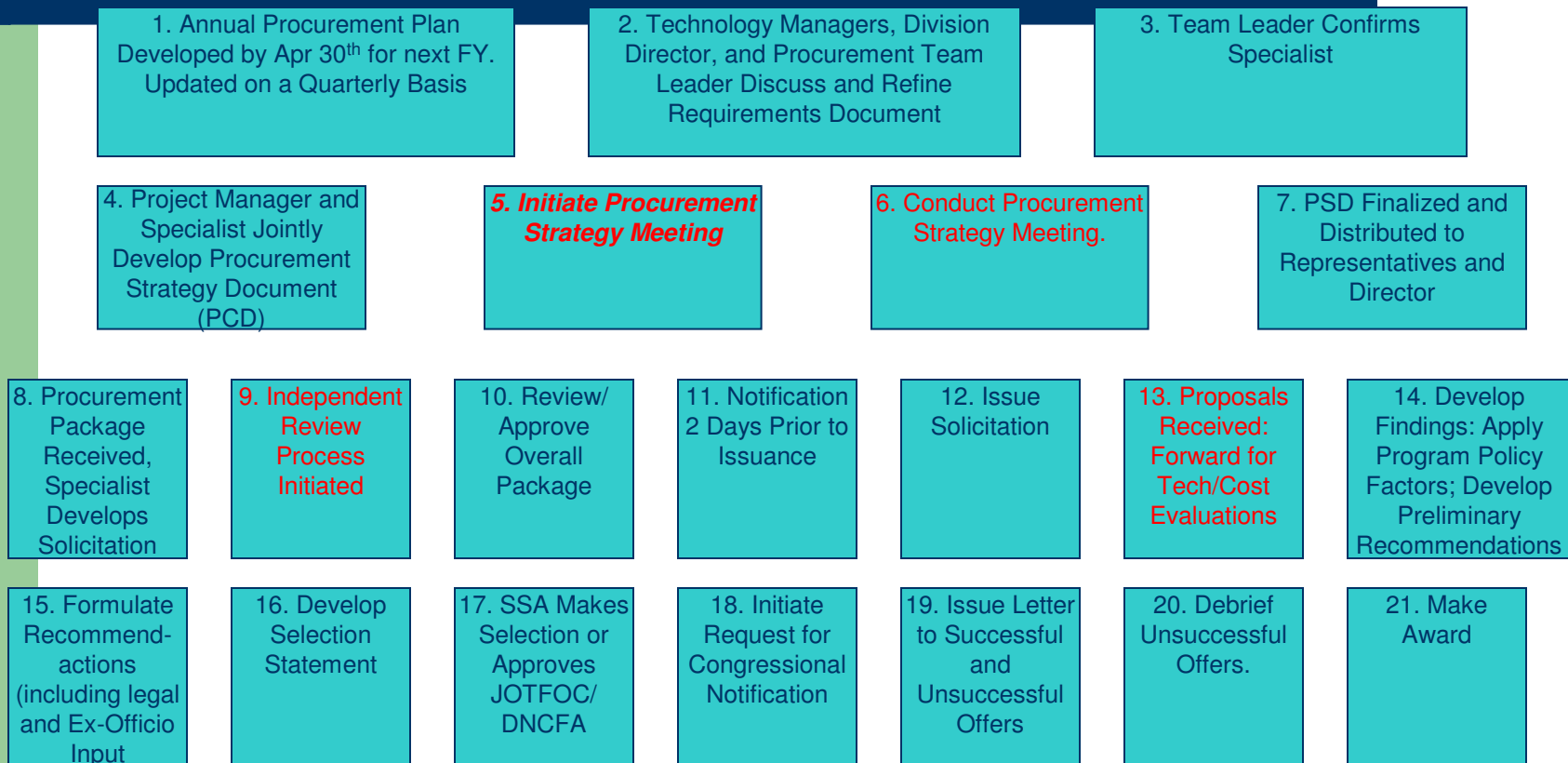
Once proposals are received and the selections are made, there is normally another independent review process for each awards selected with specific costs, which could change the clauses used (i.e. non-profit educational, etc), title, reporting, and property to be furnished and/or acquired.

THIS IS AN IMPORTANT PROCESS FOR
PROPERTY ADMINISTRATORS!

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- **Make Awards** - The contract specialist conducts negotiations with each successful offeror and awards as appropriate.

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Questions?

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