

Project Delivery Acquisition Strategy The Deputy for Small Business should be seen as a member of the PDT for each project, not be treated as a one-time information source. The Deputy needs to be involved with the PDT when contracting options are evaluated. The team needs to understand the importance and implications of fulfilling small business obligations. Participation of the Small Business Deputy on the team may help alleviate the concerns of some of our customers. Response: Accepted.

Consistent terminology should be used when referring to acquisition strategy. "Acquisition" and "procurement" are used to mean contracting. Response: Please define differences between acquisition, procurement, and contracting. Please provide specific references where we have used terms inaccurately.

This section discusses the responsibilities of the project delivery team, one of which is develop an acquisition plan for the project. While the discussion indicates that there should be a contracting member on the team, I did not find any reference to the contracting officer. The contracting officer determines the final acquisition strategy and contract type for a project, not a project delivery team. The contracting officer certainly can consult with the team, receive recommendations from the team, and even be a member of the team. But the CO should make the final decision Response: Step 8 forwards plan for approval per EFARS 7-1, but does not specify approving authority, since it differs based on contract requirements.

Need to articulate the use of other 'tools' (IDIQ database) to support acquisition strategy development. Response: Per local SOP.

Scope

This process defines the steps necessary to determine the method of **procurement** Response: Rejected. Reworded. See master document. for an **activity** Response: Reworded. See master document. product. This is an ongoing process throughout the life of the project.

Policy

EFARS 7-1 [<http://www.hq.usace.army.mil/cepr/efars/part07.pdf>]

ER 5-1-11 [<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>]

ER 37-1-26 [<http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf>]

Inappropriate for this process Response: Accepted.

Responsibility

It is the responsibility of the PM to perform and provide a market survey of industry sources. Also Contracting Division provides a potential sources sought synopsis. Both of these items are

needed in order to properly prepare the project delivery acquisition strategy. Response: Defined by regs; as a general rule, we do not redefine regs, but reference them.

The PM must take the lead and be responsible for developing the acquisition strategy for his/her projects. The PDT and Contracting organization assist and advise, however the PM must have the responsibility for ensuring the strategy is developed and meets the needs of the customer as well as the organization. Response: The PM is the leader of the PDT and has ultimate responsibility per ER 5-1-11.

The Project Delivery Team (PDT) is responsible for evaluating procurement options during project planning and execution.

The Resource Provider(s) is responsible for providing options to his PDT member after performing a Workload Analysis & Resource Leveling evaluation.

The Deputy for Small Business is responsible for **identifying options and coordinating with the Small Business Administration in order** Response: Accepted. to achieve the various goals for different contractor and contract types.

Distribution

Contracting PDT Member*
Deputy for Small Business*
Project Delivery Team (PDT)*
Resource Provider(s)*

Ownership

The BP/P2 Program Office is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

System References

Acronyms and Glossary[REF1001]
Activity Development[PROC1010]
Advanced Acquisition Strategy[PROC1006]
PMP Development[PROC1012]
Project Workload Analysis & Resource Leveling[PROC1014]
Resource Estimate Development[PROC1003]

Activity Preface

PM should provide lead and Contracting and SB should be actively involved. Response: The PM is the leader of the PDT and has ultimate responsibility per ER 5-1-11.

This process is performed whenever a resource estimate (see *Resource Estimate Development*[PROC1003]) is developed or modified which includes one or more project activities with a method of accomplishment of “contract.” The level of detail of the strategy will be equal to the value and complexity of the proposed acquisition. Where is the guidance on how much ‘detail’ goes into the ‘project delivery acquisition strategy’ for a low value/low complexity acquisition versus the detail for a medium value/medium complexity or a high value/ high

complexity acquisition? The EFARS policy cited addresses formal acquisition plans for services or supplies over \$30 M and over \$15 M. but these are few and far from typical. Construction and design build contracts are excluded. The guidance on an informal acquisition strategy is a bit light. Recommend better guidance in this Manual. Response: See PMP Content for level of detail. Defined by regs; as a general rule, we do not redefine regs, but reference them.

The strategy will be prepared as soon as possible in the planning of the project and will capture the acquisition decisions made throughout the life of the project. Evaluation of contract strategy will include the PDT, as well as the Resource Providers and the Deputy for Small Business, and may result in a requirement for a formal acquisition plan.

Since this process is part of the *PMP Development*[PROC1012], the first time through, this process assumes an unapproved PMP. An approved PMP will include the approved acquisition strategy for the project, which will be used in the AAPB *Advanced Acquisition Strategy*[PROC1006].

As this process was called from *Resource Estimate Development*[PROC1003], you will return to that process upon completion of this one.

Project Delivery Team (PDT)

1. Develop procurement options (A-E, construction, **small business programs** [Response: Accepted](#), etc) for identified activities.
2. Review Advanced Acquisition Planning Board recommendations.
Recommendations are made during the meetings of the AAPB. Recommendations may be project-specific, contracting strategies, or goals described in board minutes. Refer to *Advanced Acquisition Strategy*[PROC1006]. **Should have an indication of Commander's goal regarding SB/SDB 8A etc, if not part of AAPB recommendation.** [Response: It is part of the Advanced Acquisition Strategy.](#)

Resource Provider(s), Deputy for Small Business

3. Provide PDT member with identified acquisition options for activities evaluated for acquisition strategy.
This may include A-E firms, construction contractors, and considerations of specific small businesses.

Project Delivery Team (PDT)

4. Evaluate all options (initial and ones provided by Resource Providers, Deputy for Small Business).

If agree to recommended alternative, go to task #5. Otherwise, go to task #1.

5. Specify in P3e contract type on each needed activity.
This is part of what completes the constrained PMP and Project Execution and Control for the Advanced Acquisition Strategy.
The contract type is one of the numerous activity codes described in *Activity Development*[PROC1010]. **Project acquisition plans should feed AAPB not visa versa. Projects will be accepted for implementation and work commenced between AAPBs. The process, as proposed, can not be implemented.** [Response: The AAPB utilizes the data from project acquisition via P2 data. The AAPB changes the project acquisition strategy by exception.](#)

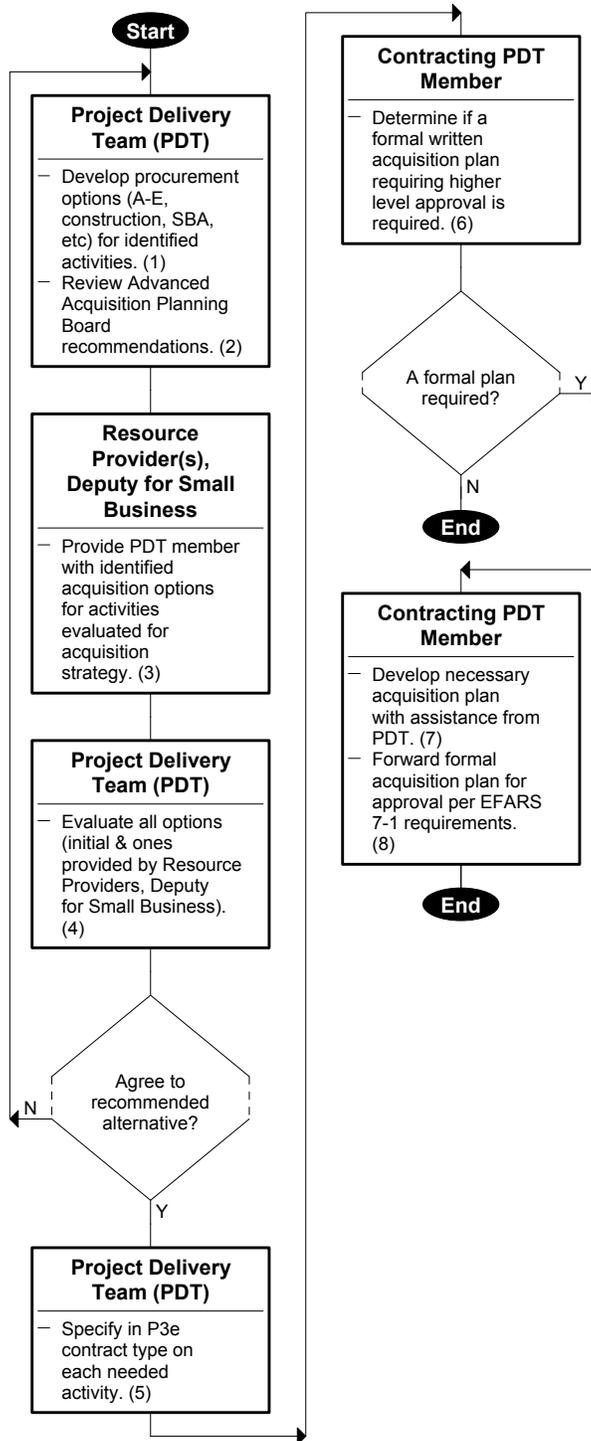
Contracting PDT Member

6. Determine if a formal written acquisition plan requiring higher level approval is required. Contract thresholds dictate when formal acquisition plans are required (see *EFARS 7-1* [<http://www.hq.usace.army.mil/cepr/efars/part07.pdf>].)

If a formal plan required, go to task #7. Otherwise, end of activity.

7. Develop necessary acquisition plan with assistance from PDT.
8. Forward formal acquisition plan for approval per EFARS 7-1 requirements.

End of activity.



Project Delivery Acquisition Strategy Flowchart

