

## Introduction

**Approximate Length:** 40 minutes

Welcome to the **Planning the Acquisition** lesson.

Upon completion of this lesson you will be able to answer these questions:

- What Are the Characteristics of an Effective Acquisition Team?
- What Are the Activities of Acquisition Planning?

[Review the lesson learning objectives.](#)



### Print Version

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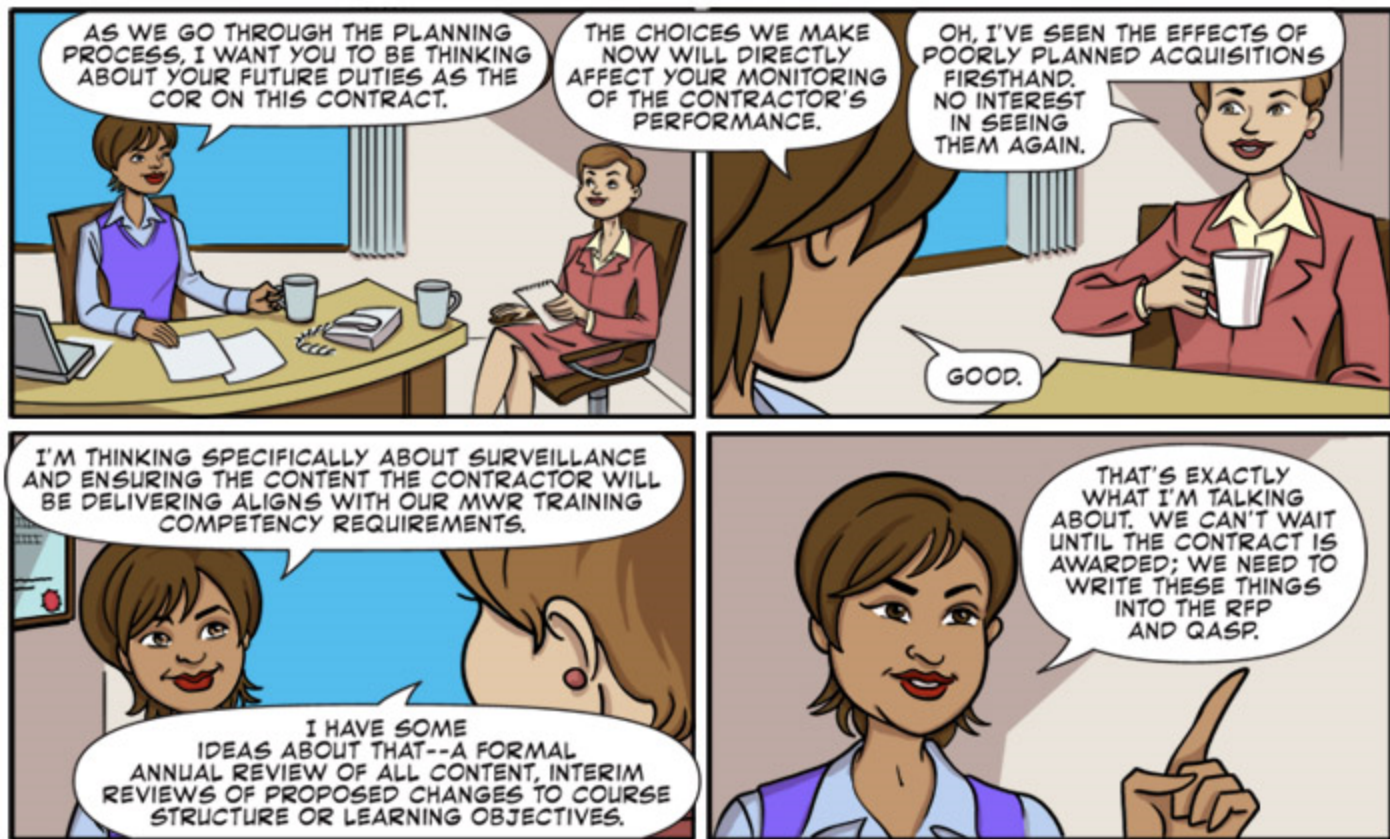
- Identify the characteristics of an effective acquisition team.
- Identify the activities performed in planning the acquisition.



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## What Are the Characteristics of an Effective Acquisition Team?



## What Are the Characteristics of an Effective Acquisition Team?



### Long Description

Setting: Interior Office with Gail (Project manager working at MWR head quarters) and Mary (Civilian Leader, Army, Academy for MWR Training) are talking after an IPT meeting.

Gail: As we go through the planning process, I want you to be thinking about your future duties as the COR on this contract

Gail: The choices we make now will directly affect your monitoring of the contractor's performance.

Mary: Oh, I've seen the effects of poorly planned acquisitions firsthand. no interest in seeing them again

Gail: Good

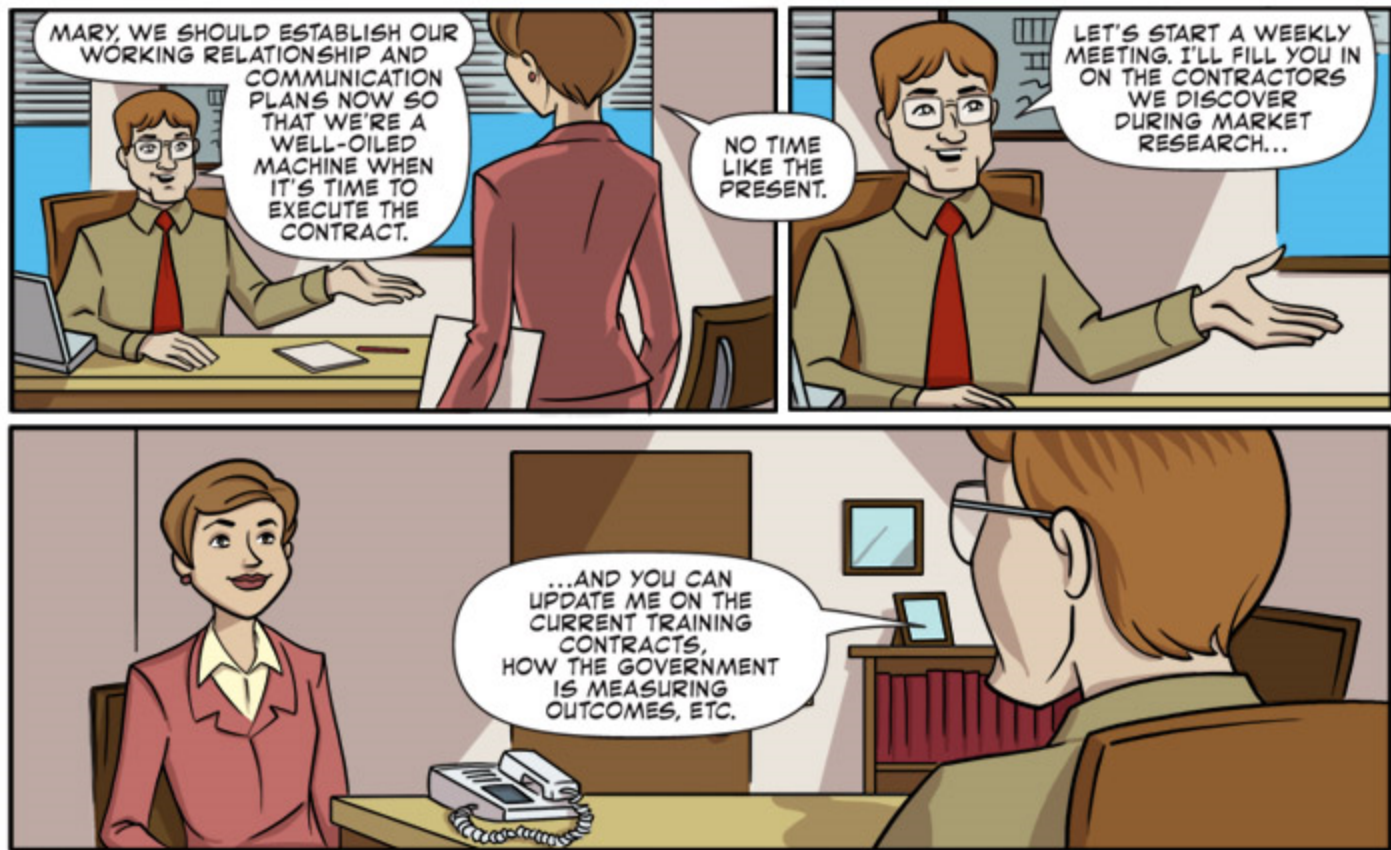
Gail: I'm thinking specifically about surveillance and ensuring the content the contractor will be delivering aligns with our MWR training competency requirements.

Mary: I have some ideas about that -- A formal annual review of all the content, interim reviews of proposed changes to course structure or learning objectives

Gail: That's exactly what I'm talking about. we can't wait until the contract is awarded: we need to write these things into the RFP and QASP



### What Are the Characteristics of an Effective Acquisition Team?, Cont.



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## What Are the Characteristics of an Effective Acquisition Team?, Cont.

**Long Description**

Setting: Interior Office with John (Contracting Officer) and Mary (Civilian Leader, Army, Academy for MWR Training) are talking after an IPT meeting.

John: Mary, we should establish our working relationship and communication plans now so that we're a well-oiled machine when it's time to execute the contract.

Mary: No time like the present.

John: Let's start a weekly meeting. I'll fill you in on the contractors we discover during market research . . . and you can update me on the current training contracts—how the government is measuring outcomes, etc.

MARY, WE SHOULD ESTABLISH OUR WORKING RELATIONSHIP AND COMMUNICATION PLANS NOW SO THAT WE'RE A WELL-OILED MACHINE WHEN IT'S TIME TO EXECUTE THE CONTRACT.

LET'S START A WEEKLY MEETING. I'LL FILL YOU IN ON THE CONTRACTORS WE DISCOVER DURING MARKET RESEARCH...

CONTRACTS, HOW THE GOVERNMENT IS MEASURING OUTCOMES, ETC.

## Planning for the Acquisition

Planning for an acquisition is the best way of ensuring that the product or service will be acquired in the most efficient, trouble-free manner.

The Government acquisition team should begin this process as soon as a program need is identified and it becomes obvious that the need must be met outside the Government. Acquisition planning involves a general consideration of all the activities that will be required in connection with a particular acquisition.

Advance acquisition planning helps the Government to efficiently acquire goods and services by facilitating the allocation and scheduling of the early work involved with an acquisition, such as market surveys and pre-solicitation notices.

It also helps to resolve potential problems sooner in the process, such as identifying trade-offs between cost schedule and performance. CORs are valuable team members in the acquisition planning process.

### Phases of the Services Acquisition Process



## Planning for the Acquisition

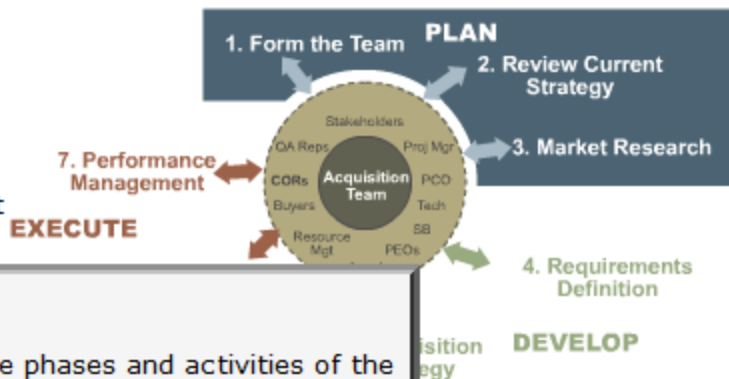
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### Phases of the Services Acquisition Process



#### Long Description

A conceptual graphic depicting the phases and activities of the Services Acquisition Process with the Plan phase highlighted



## The Team Effort



When the potential need for Government property will be considered to meet acquisition objectives, it's advisable to request support from a Property Specialist. Property Specialists can help to ensure the solicitation offers terms that protect the Government's interests, and assist to research available assets.

As we've seen in the process overview, many players are needed to complete the services acquisition process, and teamwork is required to be effective. From the end users, to requirements generators, to [Contracting Officer \(KO\)](#), contract auditors, [Contracting Officer's Representatives \(COR\)](#) and contractors, everyone must work together and share a common goal of supporting mission outcomes through contract performance. If technical or business problems are not solved before they disrupt the contractor's scheduled performance, they can jeopardize the mission.



Contract administration can be simple or complex and time consuming, depending on the type of contract, contractor performance, and the complexity of the work. For example, a firm-fixed-price contract for a commercial item may require relatively little post-award administration, whereas a cost-plus-fixed-fee contract for research and development requires careful technical surveillance and auditing of cost.

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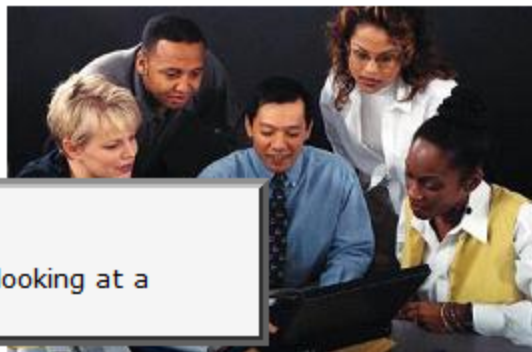
contract auditors, [Contracting Officer's Representatives \(COR\)](#) and

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contract performance. A group of people meeting around a table looking at a laptop. performance, they can support the mission.

### Long Description

A group of people meeting around a table looking at a laptop.



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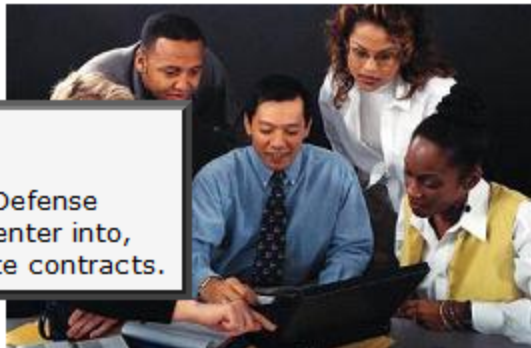
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auditors, [Contracting Officer](#) contractors, everyone must have a common goal of supporting mission and contract performance. If technical issues are not solved before they disrupt the contractor's scheduled performance, they can jeopardize the mission.

### Contracting Officer (KO)

Service member or Department of Defense civilian with the legal authority to enter into, administer, modify, and/or terminate contracts.



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contract  
auditors, [Contracting Officer's Representative \(COR\)](#)  
contractors  
common goal  
contract performance  
not solved  
performance

### Contracting Officer's Representative (COR)

"Contracting officer's representative" means an individual designated in accordance with subsection 201.602-2 of the Defense Federal Acquisition Regulation Supplement and authorized in writing by the contracting officer to perform specific technical or administrative functions.



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## The COR of the Team

The COR functions as the "eyes and ears" of the KO while monitoring technical performance, and reports any potential or actual problems to the KO. It is imperative that the COR stay in close communication with the KO, relaying any information that may affect contractual commitments and requirements.

The COR also develops and maintains the knowledge base over the project life. Capturing the daily events and performance results not only helps assess current performance, it develops a baseline for adjusting future requirements documents or can support changes to the current contract.

Knowledge management is a people issue, which requires a disciplined and objective approach. It is having the right knowledge in the right place at the right time and in the right context.



The KO delegates certain contract administration authorities to the COR, but the responsibility for the contract remains with the KO.

## COR Relationships

Establishing a joint partnership between you and your KO is essential. This relationship allows you to establish and achieve the contract objectives because both of you are responsible for ensuring that the contracting process is successful.

You've also got to build an effective teaming relationship with your contractor. Companies do not take on contracts to fail; they also have a commitment to supporting the mission outcomes required under the contract.

They can bring vital information to the table in solving problems, improving performance and reducing costs if they are given the opportunity to be an effective part of the team.





## Team Building Resources

Below are the Ten Golden Rules for building effective teams.

- **Ethical Behavior at All Times** - Trust, integrity, commitment and discipline are expected among team members.
- **Open Communication** - Share all the information that can be legally/ethically shared.
- **Trusting Communications** - Identify problems early and don't shoot the messenger. Work on solutions, not accusations. There is never an excuse for rudeness.
- **Win-Win Interactions** - Understand each other's world well enough so that compromises can be made.
- **Make and Fulfill Commitments** - Team members are expected to make commitments and to manage their part of the program to meet them. This includes technical, cost, and schedule performance as well as performing for the good of the whole system. Be responsible and accountable.
- **Lockstep Together** - No surprises to the partners. Decisions that will or may affect the program will be made with each other's knowledge. Program Office must have the earliest possible chance to react and protect the program.
- **Long Term View** - Short-term expedient decisions are bad; expect to be in the business for the long term. Be willing to take short-term pain for long-term gain. Know you will live for a long time with what you do today.
- **Teamwork** - Act to maintain the long-term integrity of the program and the team.
- **Fault Tolerant** - Manage risks, but accept that mistakes will occur. Have a disciplined approach to handle them.
- **Tailored Processes** - Expect that some bureaucratic processes may require tailoring (including waivers).

## Knowledge Review

As the COR, your participation as a team member can affect the outcome of the mission. What are some things to keep in mind that will help you and your team to be successful?

Select all that apply

- ☒ Stay in close communication with the KO, relaying any information that may affect contractual commitments and requirements.
- ☐ Manage risks with a zero tolerance for mistakes.
- ☐ Make decisions that will get the fastest results, as long as they benefit the contract now.
- ☒ Identify business and technical problems early so they do not disrupt the contractor's scheduled performance.

Check Answer



As a COR, remember to **stay in close communication with the KO, relaying any information that may affect contractual commitments and requirements and identify business and technical problems early so they do not disrupt the contractor's scheduled performance.**

However, short-term expedient decisions are bad; you should expect to be in the business for the long term and you should manage risks, but accept that mistakes will occur.

## Knowledge Review

As the COR, you develop and maintain the knowledge base over your project's life, which means capturing the daily events and performance. Which of the following is true of this activity?

Select all that apply.

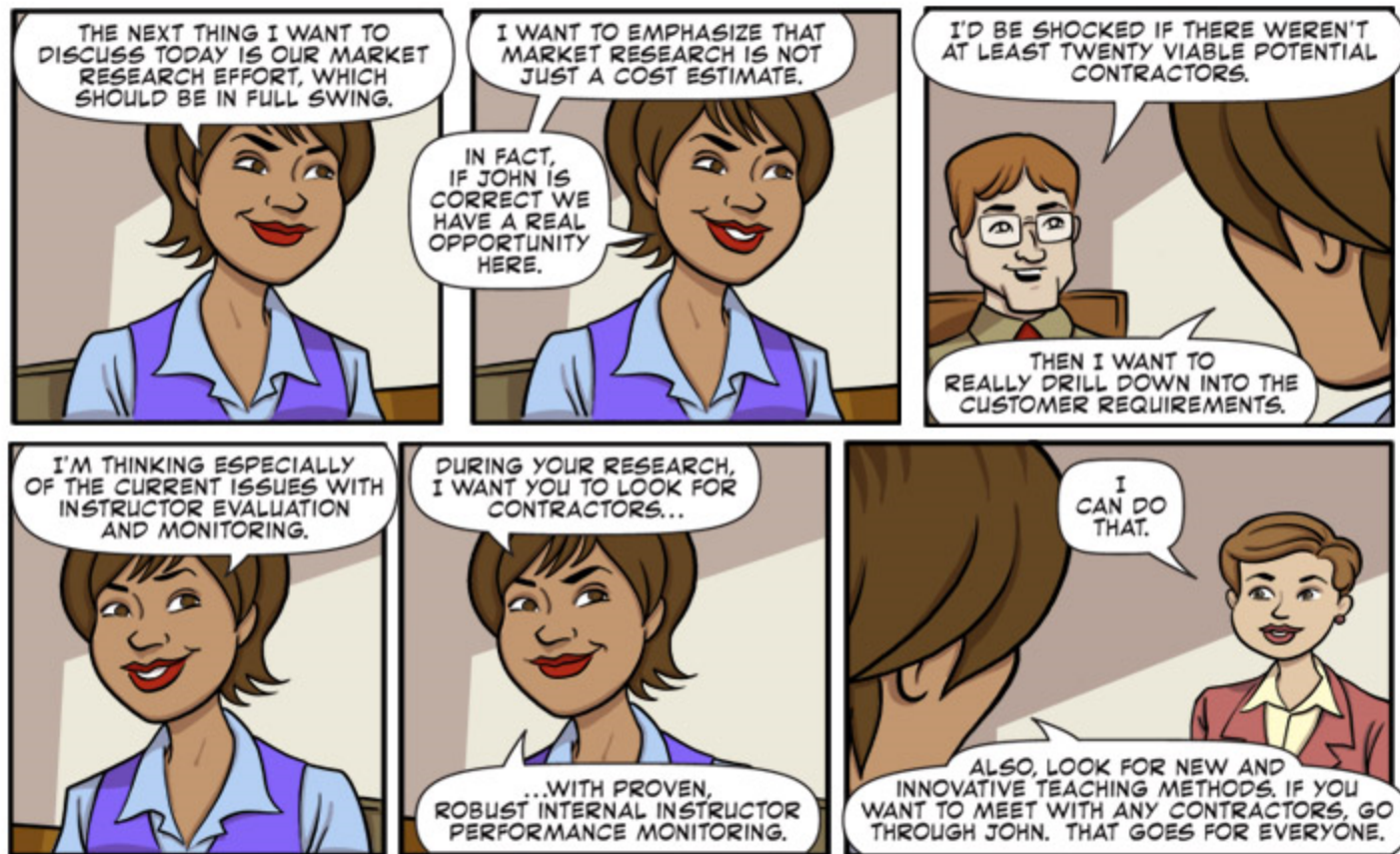
- ☒ The knowledge base helps develop a baseline for adjusting future requirements documents.
- ☒ You should report your findings along with any potential or actual problems to the KO.
- ☒ The data collected can support changes to the current contract.
- ☒ Even though this is the COR's task, the responsibility of the contract remains with the KO.

Check Answer



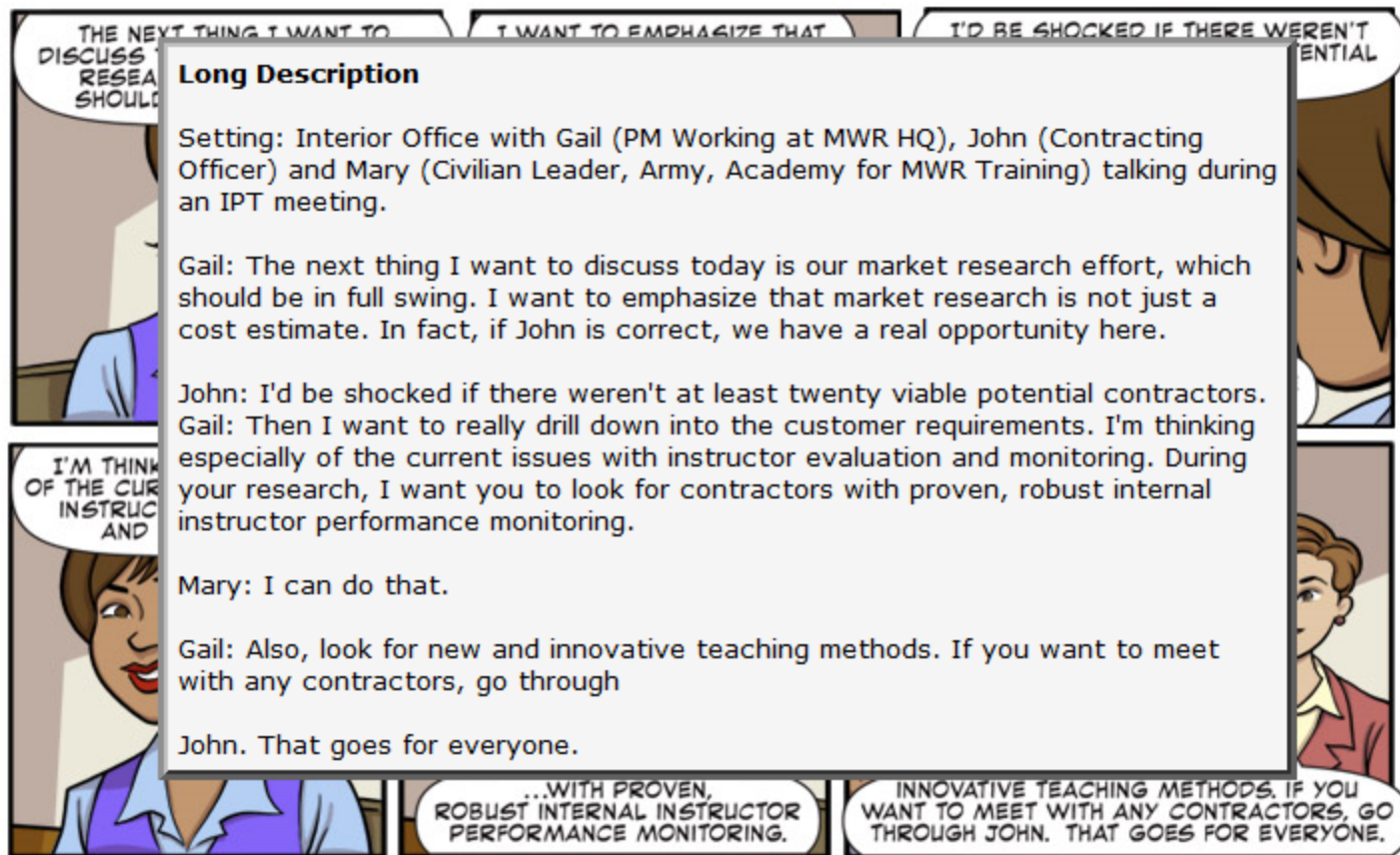
**All of these statements are true** of the COR's responsibility of the project's knowledge base.

## What Are the Activities of Acquisition Planning?



[D](#)

## What Are the Activities of Acquisition Planning?



**Long Description**

Setting: Interior Office with Gail (PM Working at MWR HQ), John (Contracting Officer) and Mary (Civilian Leader, Army, Academy for MWR Training) talking during an IPT meeting.

Gail: The next thing I want to discuss today is our market research effort, which should be in full swing. I want to emphasize that market research is not just a cost estimate. In fact, if John is correct, we have a real opportunity here.

John: I'd be shocked if there weren't at least twenty viable potential contractors.

Gail: Then I want to really drill down into the customer requirements. I'm thinking especially of the current issues with instructor evaluation and monitoring. During your research, I want you to look for contractors with proven, robust internal instructor performance monitoring.

Mary: I can do that.

Gail: Also, look for new and innovative teaching methods. If you want to meet with any contractors, go through

John. That goes for everyone.

...WITH PROVEN, ROBUST INTERNAL INSTRUCTOR PERFORMANCE MONITORING.

INNOVATIVE TEACHING METHODS. IF YOU WANT TO MEET WITH ANY CONTRACTORS, GO THROUGH JOHN. THAT GOES FOR EVERYONE.

## Planning Activities

The main activities of the planning phase are:

- Form the team
- Review current strategy
- Conduct Market Research
- Define the requirement
- Develop the requirements document for the particular proposed acquisition
- Obtain required approvals and clearances

It should be emphasized that KOs can provide valuable advice to Program Managers and to CORs in this early stage. For example:

- Types of contracts suitable for the contemplated acquisition, can be discussed, which can impact upon amount and timing of funding needed. These types of contracts fall into two categories: cost-type contracts and fixed price contracts.
- Market research and historical analysis of similar acquisition can be performed, which will assist the directorate in assessing the capability of the market place to satisfy its needs.



Program Managers and CORs should involve their supporting contracting staff early in the development of all requirements. Open communication and collaboration are essential to ensure a successful acquisition.



## Review Current Strategy

The acquisition team must review past acquisition documentation, historical data and talk with stakeholders in order to establish an acquisition requirements baseline.

The Review Current Strategy activity of the the Plan Phase of the Services Acquisition Process includes the following activities:

- Identify current initiatives/contracts
- Review and document current performance (cost, quality, schedule)
- Begin program risk identification (cost, schedule, performance)
- Document current processes
- Determine Status of GFP/GFM/Facilities
- Submit current and projected requirements forecast
- Review current and statutory requirements
- Define (at a high level) desired results
- Review current performance and desired results with stakeholders and users
- Refine desired results and validate with stakeholders



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### Long Description

A conceptual graphic depicting the phases and activities of the Services Acquisition Process with the Plan phase highlighted.

### Review Current Strategy, Cont.

The team shall establish a current need and project description of what this effort will entail.

	<b>Requirements Forecast</b>	<b>Requirements Review</b>
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Agencies shall perform acquisition planning and conduct market research for all acquisitions in order to promote and provide for:

- Acquisition of commercial items or, to the extent that commercial items suitable to meet the agency's needs are not available, nondevelopmental items, to the maximum extent practicable.
- Full and open competition or, when full and open competition is not required, to obtain competition to the maximum extent practicable, with due regard to the nature of the supplies or services to be acquired.



[FAR 7.102 — Policy](#)

### Review Current Strategy, Cont.

The team shall establish a current need and project description of what this effort will entail.

#### Acquisition Planning Policy

#### Requirements Review

Requirements forecasting may include assessment of prior contracts, in-depth literature searches, and discussions with technical and scientific personnel, both inside and outside of the Government.

These discussions may help to determine interest, scientific approaches, requirements risk, technical capabilities, and the state-of-the-art relevant to the subject area.

### Review Current Strategy, Cont.

The team shall establish a current need and project description of what this effort will entail.

Acquisition Planning Policy	Requirements Forecast	
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After the requirement has been formulated, it must be reviewed for program relevance, need, merit, priority, and timeliness by the appropriate management staff.

In many agencies, concept development is intimately connected with its budget process because these agencies use the budget process as the primary means of identifying, defining and approving agency acquisitions.

## Conducting Market Research

Market research is required to be conducted on an on-going basis and conducted before developing new requirement documents and issuing solicitations.

Market research is a process used to collect, organize, maintain, analyze, and present data.

Its purpose is to maximize the capabilities, technology, and competitive forces of the marketplace to meet an organization's needs for supplies/services.

You may be asked to assist in conducting and gathering this information that will be used by the appropriate decision makers to determine the best acquisition approach.

[FAR Part 10](#) discusses market research.





## Market Research - Factors

Acquisitions begin with a description of the Government's needs stated in terms sufficient to allow the acquisition team to conduct market research. The research will vary, depending on such factors as urgency, estimated dollar value, complexity, and past experience.

This research involves obtaining information specific to the item being acquired and determining whether the Government's needs can be met by items that are customarily available in the commercial marketplace, or by items used exclusively for governmental purposes.

Results should be documented in a manner appropriate to the size and complexity of the acquisition. Market research also helps the Government develop [Independent Government Estimates \(IGE\)](#) when conducting [cost analysis](#).



Additional information on market research, cost estimating, and IGE cost elements is provided in the [COR Community of Practice](#) and in DAU's [Continuous Learning Module CLC004](#) (Market Research) and [CLM016](#) (Cost Estimating).

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### Independent Government Estimate (IGE)

The government's estimate of resources and cost of resources a prudent contractor will incur in the performance of a contract.



Additional information on market research, cost estimating, and IGE cost elements is provided in the [COR Community of Practice](#) and in DAU's [Continuous Learning Module CLC004](#) (Market Research) and [CLM016](#) (Cost Estimating).

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Results should be based on market research. Market research conducted [cost](#)

### Cost Analysis

Review and evaluation of the separate cost elements and proposed profit contained in an offerer's or contractor's proposals and the application of judgment to determine how well the proposed costs represent what the cost of the contract should be, assuming reasonable economy and efficiency.

the acquisition.  
[Costs \(IGE\)](#) when



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## Early Exchanges with Industry



Remember it's important to solicit ideas from industry in order to increase competition and commerciality. However, it's a good idea to coordinate with the KO when interfacing with industry.

Early involvement with industry will provide the Government's acquisition team an opportunity to obtain up-to-date information on technology and market conditions and help industry to understand the Government's requirements. Guidance is provided in [FAR 15.201](#), Exchanges With Industry Before Receipt of Proposals.

Some techniques used to interact with industry are:

- Industry conferences or public hearings.
- One-on-one meetings with potential offerors.
- Use of a [Request for Information \(RFI\)](#). An RFI is a document that is sent out to one or more potential contractors to request information that may be used to develop Government requirements and solicitation terms and conditions.
- Use of a draft [Request for Proposals \(RFP\)](#). A draft RFP is used to solicit potential offeror comments to help improve the final version of the RFP.

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- Use of a [Request for Information \(RFI\)](#) to solicit information from potential contractors to request information that may be used to develop government requirements and solicitation terms and conditions.
- Use of a draft [Request for Proposals \(RFP\)](#). A draft RFP is used to solicit potential offeror comments to help improve the final version of the RFP.

### Request for Information (RFI)

An RFI is a early exchange of information between the government and industry used when the government does not intend to award a contract immediately, but wants to obtain price, delivery, other market information, or capabilities for planning purposes. An RFI cannot be used to create a contract without the issuance of an actual solicitation document.

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Some techniques used are:

### Request for Proposals (RFP)

- Industry conference. In the negotiation method of contracting, an RFP is the solicitation used to communicate the government's requirements to prospective contractor(s) and to solicit proposal(s).
- One-on-one solicitation. In the negotiation method of contracting, an RFP is the solicitation used to communicate the government's requirements to prospective contractor(s) and to solicit proposal(s).
- Use of a [Request for Information \(RFI\)](#). An RFI is a document that is sent out to one or more potential contractors to request information that may be used to develop Government requirements and solicitation terms and conditions.
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### Knowledge Review

When planning for an acquisition, Program Managers and CORs should not involve supporting staff until all of the requirements are defined.

☐ True

☒ False

Check Answer



Correct answer: **False.** Program Managers and CORs should involve their supporting contracting staff early in the development of all requirements.

## Knowledge Review

Which activity in the acquisition planning processes is used to maximize the capabilities, technology, and competitive forces of the marketplace to meet an organization's needs for supplies or services?

- ☐ developing an acquisition plan
- ☒ conducting market research
- ☐ selecting contract type
- ☐ obtaining required approvals and clearances

Check Answer



**Market research** is a process used to collect, organize, maintain, analyze, and present data. Its purpose is to maximize the capabilities, technology, and competitive forces of the marketplace to meet an organization's needs for supplies or services.

## Summary

Congratulations! You have completed the Planning the Acquisition lesson.

*Select each item for a summary of each topic.*

[What Are the Characteristics of an Effective Acquisition Team?](#)

[What Are the Activities of Acquisition Planning?](#)

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### **What Are the Characteristics of an Effective Acquisition Team?**

For the acquisition team to be effective, all members of the team must work together and share a common goal of supporting mission outcomes through contract performance. Complex, as well as simple, issues can jeopardize the mission of the contract.

Because the KO is responsible for all aspects of the contract, as the COR, you must keep the KO in the loop at all times, even when tasks have been delegated to you. Continuing this relationship with your KO and building a professional relationship with the contractor is an essential aspect of being an effective team member.

## Summary

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[What Are the Characteristics of an Effective Acquisition Team?](#)

[What Are the Activities of Acquisition Planning?](#)

### What Are the Activities of Acquisition Planning?

The main activities involved in planning an acquisition are:

- Defining the requirement
- Developing the requirements document for the particular proposed acquisition
- Obtaining required approvals and clearances
- Conducting market research
- Interacting with the industry
- Identifying tradeoffs

## Lesson Completion

You have completed the content for this lesson.

To continue, select another lesson from the Table of Contents on the left.

If you have closed or hidden the Table of Contents, click the Show TOC button at the top in the Atlas navigation bar.