**Streamlined Acquisition Plan (AP) for Task Orders under an IDIQ**

**OLAO**

|  |  |
| --- | --- |
| Requiring Activity *(Program Office/IC)* | Project Title |
| Contracting Office | Is this an Assisted Acquisition [ ]  Yes [ ]  No |
| Estimated Value *(Including Options)* | Target Award Date |

# Are the services [Inherently Governmental](https://www.whitehouse.gov/omb/procurement_index_work_performance/), a function that is so intimately related to the public interest as to require performance by Federal Government employees?

[ ] Yes[ ] No If yes, the services cannot be obtained through a contract.

# Requirement type (Select one or more)

[ ]  Supplies/Equipment *(Including IT Equipment)*

[ ]  Severable Services1 [ ]  Nonseverable Services2

[ ]  Non-R&D

[ ]  Support Services R&D Support Services

[ ]  Information Technology (IT) Support Services

[ ]  Other Services (specify):

# Describe briefly the supplies/services to be acquired

# Requirements document type (please attach the document selected below).

Supplies:

[ ]  Description/Specifications and Delivery Requirements for Supplies

Services:

[ ]  Performance Work Statement (PWS)

[ ]  Statement of Work (SOW) or

[ ]  Item Specifications/Description Statement of Objectives (SOO) (see [FAR 37.602(c))](https://www.acquisition.gov/content/part-37-service-contracting#i1077411)

A SOW is typically used when the task is well-known, can be described in specific terms and is not performance based, whereas a PWS or SOO focus on desired outcomes and performance standards. In a PWS, the Government clearly describes the performance objectives and standards that are expected of the contractor whereas in a SOO, the Government provides the basic, high-level objectives of the acquisition and the contractors' proposals contain their PWS and performance standards which are then incorporated into the contract. If applicable, a list of contract deliverables should be attached.

1A severable service is one that is recurring and continuing in nature and provides value to the Government as the service is performed. Most services are severable.

2A nonseverable service is one that produces a single or unified outcome, product or report that cannot be subdivided for separate performance in different fiscal years. Whether the subdivision is feasible or not is a matter of judgment that includes as a minimum a determination of whether the government has received value from the service rendered.

# The Requirement has [ ]  or has not [ ]  been procured in the past.

If procured in the past, provide brief procurement history (contract no. etc.) including the extent of small business participation.

# Will the proposed action be [ ]  competitive or [ ]  noncompetitive? If noncompetitive, indicate proposed source.

(Include Justification for an Exception to Fair Opportunity (applicable to orders under IDIQs) as an attachment to this AP.)

# How will the acquisition support the achievements of [small business/other socio-economic goals/targets](https://www.acquisition.gov/content/part-19-small-business-programs#i1101793)? Also address potential for [subcontracting](https://www.acquisition.gov/content/part-19-small-business-programs#i1100205).

Please provide a brief description.

# Describe the nature and extent of the [market research](https://www.acquisition.gov/content/part-10-market-research) that was conducted [e.g. review of commercial pricelists, GSA schedules, personal knowledge of industry, review of contractdirectory.gov (a central depository of Indefinite Delivery Vehicles), review of Agency’s small business database, etc.].

Please discuss market research conducted. Please attach a list of sources and addresses if known.

# Which of the following strategic sourcing vehicles is being used?

[ ]  [NIH Technology Assessment and Acquisition Center (NITAAC)](http://nitaac.nih.gov/nitaac/)

[ ]  [Long-Term Administrative Support Contract (LTASC) IDIQ Contract Vehicle](https://ltasc.od.nih.gov/)

[ ]  [Public Information and Communication Services (PICS) IDIQ Contract Vehicle](https://pics.olao.od.nih.gov/)

[ ]  [NIH Business and Professional Support Services (NIHBPSS) IDIQ Contract Vehicle](https://nihbpss.olao.od.nih.gov/)

[ ]  [NIH Conference, Administrative, and Travel Services Contract](https://nihcats.olao.od.nih.gov/) (NIHCATS) IDIQ Contract Vehicle

[ ]  Other *(Specify)*

# Are there any known challenges that drive the mission or acquisition approach?

[ ]  **Yes** [ ]  **No** *(If yes, address here)*

# Is there any congressional interest in the requirement?

[ ]  **Yes** [ ]  **No** *(If yes, address here)*

# Special Contract Requirements

* 1. **Is this requirement for Information Technology services and/or support?**

[ ]  **Yes** [ ]  **No**

**If yes, has agency coordination been done, if required?**

[ ]  **Yes** [ ]  **No** *(If yes, attach a copy of the IT Clearance/Approval)*

# Do HSPD-12 security requirements apply?

[ ]  **Yes** [ ]  **No** *(If yes, state required security level)*

# Does the acquisition include [Electronic Information Technology](https://www.acquisition.gov/content/part-39-acquisition-information-technology#i1077004) or a deliverable that must be [Section 508](http://www.section508.gov/) compliant?

[ ]  **Yes** [ ]  **No** *(If yes, identity any additional standards and/or deliverables not outlined at the IDIQ Contract Vehicle level)*

# Does the acquisition include conference expenses as defined by [HHS Policy on Promoting Efficient Spending](http://www.hhs.gov/grants/contracts/contract-policies-regulations/efficient-spending/index.html) dated January 23, 2015?

[ ]  **Yes** [ ]  **No** *(If yes, attach required conference approval or explain why approval is not necessary)*

* 1. **Does the acquisition include a requirement for patents, data and copyrights beyond those granted by Rights in Data - General (FAR Clause** [**52.227-14**](https://www.acquisition.gov/content/52227-14-rights-data-general) **)?**

[ ]  **Yes** [ ]  **No** *(If yes, describe the Patents, Data Rights, and Copyrights required (* [*FAR Part 27*](https://www.acquisition.gov/content/part-27-patents-data-and-copyrights) *and* [*HHSAR Part 327*](https://www.federalregister.gov/articles/2015/11/18/2015-28214/health-and-human-services-acquisition-regulations%23sec-327-303)*)*.

*Additional approvals and justification may be required)*

# Are there any other special requirements or clearances that the Contracting Officer should know about? [ ]  Yes [ ]  No  *(If yes, please describe)*

# Has an [Independent Government Cost Estimate (IGCE)](https://olao.od.nih.gov/sites/default/files/IGCE%20for%20Commercial%20Items.xls) been prepared?

[ ]  **Yes** (*If yes, attach a copy)* [ ]  **No** *(If no, explain when it will be completed)*

# Are there any current and potential technical, cost, schedule and performance risks associated with this requirement?

[ ]  **Yes** [ ]  **No** *(If yes, identify the level of stated risks and plans to mitigate said risks)*

# This is [ ]  or is not [ ]  a bundled requirement as defined in [FAR 2.1](https://www.acquisition.gov/content/part-2-definitions-words-and-terms#i1125357). If bundling will result in a contract/order valued at $2.5M or above, the required benefit analysis must be coordinated with the cognizant small business specialist (unless the contract or order is entirely reserved or set-aside for small business) and must be an attachment to this Acquisition Plan.

# Business Arrangements

1. **Period of Performance** (create and attach a copy)*.* (Specify all possible contract periods/option quantities, for example, Base Period and each Option Period/Quantity. For contracts with base and option periods that exceed 5 years, a Determination and Finding will need to be approved by the Head of the Contracting Activity and the HHS Senior Procurement Executive in accordance with HHSAR 317.204(e)(3) prior to solicitation.
2. ***Proposed contract type*** *(check all that apply – see FAR* [***16.1***](https://www.acquisition.gov/content/part-16-types-contracts#i1105123)*)*

[ ]  Firm-Fixed-Price

[ ]  Other Fixed-Price (specify fixed-price w/economic price adjustment, fixed-price-incentive, etc.):

[ ]  Time-and-Materials (including Labor Hour)

[ ]  Other (specify):

Please provide a brief explanation for choosing this contract type.

# Source Selection Process and the basis for award. Include the proposed evaluation criteria (e.g. technical, past performance, and cost/price) as an attachment to this AP as well as a list of proposed evaluators.

**Select One:**

[ ]  [**Low Price Technically Acceptable (LPTA)**](https://www.law.cornell.edu/cfr/text/48/15.101-2)

Include evaluation criteria that establish the requirements of acceptability on a pass/fail basis that shall be included in the solicitation.

# [ ]  Trade-Off (Among Price/Cost and Non-Price/Cost Factors)

Include evaluation criteria listing factors and significant subfactors and their relative importance. State whether all evaluation factors other than cost or price, when combined, are significantly more important than, approximately equal to, or significantly less important than cost or price.

# Has a [Quality Assurance Surveillance Plan (QASP)](https://www.acquisition.gov/content/part-46-quality-assurance#i1072108) been prepared (if applicable)? A performance-based acquisition requires the use of a QASP. The Government may either prepare the QASP or require offerors/quoters to submit a proposed QASP for the Government’s consideration.

[ ]  **Yes** *(include as an attachment)*

[ ]  **No** *(If no, explain)*

# Is Government property to be furnished to contractors?

[ ]  **Yes** [ ]  **No** (*If yes, include a list of government-furnished property as an attachment to this AP.)*

Discuss any associated considerations, such as its availability or the schedule for its acquisition.

# Is Government information (e.g. manuals, drawings and test data) to be provided to prospective offerors and contractors?

# [ ]  Yes [ ]  No *(If yes, include a list of government-furnished information as an attachment to this AP.)*

# Discuss any associated considerations, such as additional controls to monitory access and distribution.

# Has a certified COR been identified to ensure the appointment is made at the time of contract award?

[ ]  **Yes** (*Specify name and attach a copy of their certification)* [ ]  **No** *(If not, explain)*

1. **Milestone schedule:** Please create and attach a Milestone schedule which contains key points up to time of reward. Below is an example you may use and tailor as applicable*.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Acquisition Milestone** | **Target Date** | **Revised Date** | **Completion Date** |
| Acquisition Request/Completed AP |  |  |  |
| Noncompetitive J&A Approved |  |  |  |
| Solicitation Issued |  |  |  |
| Questions Received |  |  |  |
| Proposals/Quotations/Bids Received |  |  |  |
| Initial Technical Review Completed |  |  |  |
| Negotiations Start |  |  |  |
| Negotiations Completed |  |  |  |
| Contract Award Issued |  |  |  |

# Proposed acquisition funding approach

# Estimate of base year funding to be obligated for this action: $

**Funds Certifying Official’s Certification** *(To be completed by the “funds certifying official”, an individual with authority to certify that funding is available for a particular purpose.)*

**Type of Appropriations committed to this requirement:** *(Please Specify)*

[ ]  Annual-Year Appropriations – Obligational authority expires at the end of the first year appropriation and appropriation is cancelled at the end of the fifth year after expiration ([bona fide need rule](http://www.gao.gov/products/D05663) applies).

[ ]  Multiple-Year Appropriations – Obligational authority expires at the end of a designated time period greater than one year and appropriation is cancelled at the end of the fifth year after expiration (bona fide need rule applies).

[ ]  No-Year Appropriations – Appropriation is available until expended, that is, it is available for obligation without fiscal year limitation (bona fide need rule does not apply).

**Certification:** *(Please Specify)*

[ ]  I hereby certify that (a) this requirement represents a bona fide need of the fiscal year or years for which the appropriation was made and complies with the Anti-deficiency Act; and (b) funds are committed for the entire performance period of this acquisition.

[ ]  I hereby certify that (a) this requirement represents a bona fide need of the fiscal year or years for which the appropriation was made and complies with the Anti-deficiency Act; and (b) funds are committed for the base period or first increment of performance of this acquisition.

[ ]  This acquisition will use the multi-year contracting procedures authorized in [FAR 17.1](https://www.acquisition.gov/content/part-17-special-contracting-methods#i1103257) and [HHSAR 317.1](https://www.federalregister.gov/articles/2015/11/18/2015-28214/health-and-human-services-acquisition-regulations). I hereby certify that:

1. [ ]  this requirement represents a bona fide need in the fiscal year or years for which the appropriation was made and complies with the Anti-Deficiency Act; and
2. [ ]  funds are committed for the first year of performance plus the estimated amount of the full cancellation ceiling. Funds are not currently committed for this acquisition.

[ ]  Funds are not currently committed for this acquisition. NOTE: State when funds will be committed for the project, if funds are not committed when the AP is completed.

# FUNDS CERTIFICATION OFFICIAL

Name & Title

Signature

Date

# Reviews and Approvals of Acquisition Plan

*Use of this streamlined acquisition plan is limited to the Chief of the Contracting Office approval threshold.*

*Note: Please fill in with N/A for Reviews and Approvals that are not required due to the value of the Acquisition.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Official** | **N/A** | **Name and Title** | **Signature** | **Date** |
| **Requiring Activity Representative** |  |  |  |  |
| **Requiring Activity Representative's Immediate Supervisor** |  |  |  |  |
| **Program Manager** |  |  |  |  |
| **Head of the Sponsoring Program Office** |  |  |  |  |
| **Contracting Officer** |  |  |  |  |
| **Team Leader or Branch Chief (at least one level above CO)** |  |  |  |  |
| **Chief of the Contracting Office** |  |  |  |  |

# Attachments

List and include all attachments, including their titles or other identifying information. Some information may be included in the AP rather than as an attachment. Examples of attachments are listed below:

* Statement of Work (SOW), Performance Work Statement (PWS), Statement of Objectives (SOO), or Description/Specifications and Delivery Requirements for Supplies
* Independent Government Cost Estimate
* Period of Performance
* Quality Assurance Surveillance Plan
* List of Deliverables and Due Dates
* Clearance/Approval Documentation (Conferences, IT, etc.)
* Copy of Current COR Certification for Nominated Individual
* Noncompetitive J&A
* Technical Evaluation Criteria
* Potential Sources and Addresses
* List of Proposed Evaluators
* List of Government-Furnished Property
* List of Government-Furnished Information
* Benefit Analysis in Support of Bundling if Equal to or Greater Than $2.5M