<Date>

**Version <X.x>**

**NOTES TO THE AUTHOR/TEMPLATE INSTRUCTIONS**

This template includes instructions and boilerplate text for this document. The author should note that:

* Each section provides instructions or describes the intent, assumptions, and context for content included in that section. Instructional text appears in *blue italicized text* throughout this template.
* Replace instructional text in each section with project specific information.
* Use or modify boilerplate examples of wording and formats for text and tables as appropriate.
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**SDLC TEMPLATE CONTACT INFORMATION**

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**APPROVAL**

**OFFICE OF INFORMATION TECHNOLOGY**

| This document approved by: |  |
| --- | --- |
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|  | **<Name>**Date  <Title> |
| --- | --- |

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*List the acronym reference and definition or description for each acronym contained in this document.*

**ACRONYM LIST**

| **REFERENCE** | **DEFINITION** |
| --- | --- |
| ANSI/EIA | American National Standards Institute/Electronics Industries Alliance |
| EVMS | Earned Value Management System |
| FAR | Federal Acquisition Regulation |
| OMB | Office of Management and Budget |
| USDA | United States Department of Agriculture |

# PURPOSE

The overall objective of this Acquisition Strategy is to document and inform investment or project stakeholders about how the acquisitions will be planned, executed, and managed throughout the life of the investment or project. It documents the approach to be taken for items such as the actual acquisition, contracting, and fiscal, legal, and personnel considerations. The Acquisition Strategy also addresses any policy, process, or regulatory tasks needed to comply with the Federal Acquisition Regulation (FAR), and any other federal and USDA requirements related to the specific acquisition.

The intended audience of the *<Investment or Project Name>* Acquisition Strategy is the project manager, project team, project sponsor, procurement officer/office, and any senior leaders whose support is needed to carry out acquisition plans.

# BACKGROUND/SCOPE

Introduce the plan with a brief statement of need. Summarize the technical and contractual history of the acquisition. Discuss feasible acquisition alternatives, the impact of prior acquisitions on those alternatives, and any related in-house effort. As applicable, review the business case (formerly the OMB Exhibit 300) Alternatives Analysis section.

# Applicable Conditions

State all significant conditions affecting the acquisition, such as requirements for compatibility with existing or future systems or programs and any known cost, schedule, and capability or performance constraints.

## Cost

Insert any sub-category background/scope information here as needed.

Set forth the established cost goals for the acquisition and the rationale supporting them, and discuss related cost concepts to be employed, including, as appropriate, the following items:

Life-cycle cost - Discuss how life-cycle costs will be considered. If it is not used, explain why. If appropriate, discuss the cost model used to develop life-cycle cost estimates.

Design-to-cost - Describe the design-to-cost objective(s) and underlying assumptions, including the rationale for quantity, learning-curve, and economic adjustment factors. Describe how objectives are to be applied, tracked, and enforced. Indicate specific related solicitation and contractual requirements to be imposed.

Application of should-cost - Describe the application of should-cost analysis to the acquisition.

## Capability Or Performance

Specify the required capabilities or performance characteristics of the supplies or the performance standards of the services being acquired and state how they are related to the need.

## Delivery Or Performance-Period Requirements

Describe the basis for establishing delivery or performance-period requirements. Explain and provide reasons for any urgency if it results in concurrency of development and production or constitutes justification for not providing for full and open competition.

## Trade-Offs

Discuss the expected consequences of trade-offs among the various cost, capability or performance, and schedule goals.

## Risks

Discuss technical, cost, schedule and risks and what efforts are planned or underway to reduce risk and the consequences of failure to achieve goals. If concurrency of development and production is planned, discuss its effects on cost and schedule risks.

# Acquisition Streamlining

Discuss plans and procedures to encourage industry participation by using draft solicitations, pre-solicitation conferences, and other means of stimulating industry involvement during design and development in recommending the most appropriate application and tailoring of contract requirements; select and tailor only the necessary and cost-effective requirements; and state the timeframe for identifying which of those specifications and standards, originally provided for guidance only, will become mandatory.

# PLAN OF ACTION

Describe the actions necessary to execute this strategy.

## Sources

Indicate any prospective sources of supplies or services that can meet the need.

## Competition

Describe how competition will be sought, promoted, and sustained throughout the course of the acquisition. If full and open competition is not contemplated, cite the authority and discuss the basis for the application of that authority, identify the source(s), and discuss why full and open competition cannot be obtained.

## Source-Selection Procedures

Discuss the source-selection procedures for the acquisition, including the timing for submission and evaluation of proposals, and the relationship of evaluation factors to the attainment of the acquisition objectives.

## Acquisition Considerations

For each contract contemplated, discuss contract type selection; use of multiyear contracting, options, or other special contracting methods; any special clauses, special solicitation provisions, or FAR deviations required; whether sealed bidding or negotiation will be used and why; whether equipment will be acquired by lease or purchase and why; and any other contracting considerations.

## Budget and Funding

Include budget estimates, explain how they were derived, and discuss the schedule for obtaining adequate funds at the time they are required.

## Product or Service Descriptions

Explain the choice of product or service description types (including performance-based acquisition descriptions) to be used in the acquisition.

## Priorities, Allocations, and Allotments

When urgency of the requirement dictates a particularly short delivery or performance schedule, certain priorities may apply. If so, specify the method for obtaining and using priorities, allocations, and allotments, and the reasons for them.

# Contractor versus Government Performance

Refer to Office of Management and Budget (OMB) Circular No. A-76.

# Management Information Requirements

Discuss, as appropriate, what management system will be used by the Government to monitor the contractor’s effort. If an Earned Value Management System (EVMS) is to be used, discuss the methodology the Government will employ to analyze and use the earned value data to assess and monitor contract performance. In addition, discuss how the offeror's/contractor's EVMS will be verified for compliance with the American National Standards Institute/Electronics Industries Alliance (ANSI/EIA) Standard-748, Earned Value Management Systems and the USDA Departmental Regulation, [DR3130-006](http://www.ocio.usda.gov/sites/default/files/docs/2012/DR%203130-006%20Earned%20Value%20Management.pdf), USDA Earned Value Management, and the timing and conduct of integrated baseline reviews (whether prior to or post award).

# Make or Buy

Discuss any consideration given to make-or-buy programs.

# Test and Evaluation

To the extent applicable, describe the test program of the contractor and the Government. Describe the test program for each major phase of an USDA Major IT investment or project acquisition. If concurrency is planned, discuss the extent of testing to be accomplished before production release.

# Logistics Considerations

Include consideration of contractor or agency maintenance, servicing, and distribution of commercial items, reliability, maintainability, and quality assurance requirements, including any planned use of warranties.

# Government – Furnished Property

Indicate any Government property to be furnished to contractors, and discuss any associated considerations, such as its availability or the schedule for its acquisition.

## Government – Furnished Information

Discuss any Government information, such as manuals, drawings, and test data, to be provided to prospective offerors and contractors. Indicate which information requires additional controls to monitor access and distribution (e.g., technical specifications, maps, building designs, schedules, etc.), as determined by the agency.

# Environmental and Energy Conservation Objectives

Discuss all applicable environmental and energy conservation objectives associated with the acquisition, the applicability of an environmental assessment or environmental impact statement, the proposed resolution of environmental issues, and any environmentally-related requirements to be included in solicitations and contracts.

# Security Considerations

For IT acquisitions, discuss how agency information security requirements will be met. For acquisitions requiring routine contractor physical access to a Federally-controlled facility and/or access to a Federally-controlled information system, discuss how agency requirements for personal identity verification of contractors will be met.

# Contract Administration

Describe how each contract will be administered. In contracts for services, include how inspection and acceptance corresponding to the work statement’s performance criteria will be enforced.

# Other Considerations

Discuss as applicable or denote as ‘Not applicable’:

* *Standardization concepts*
* *The industrial readiness program*
* *The Occupational Safety and Health Act*
* *Any other matters germane to the plan not covered elsewhere*

# Acquisition Cycle Milestones

Discuss the following:

* *Acquisition plan approval*
* *Statement of work*
* *Specifications*
* *Data requirements*
* *Completion of acquisition-package preparation*
* *Purchase request*
* *Justification and approval for other than full and open competition where applicable and/or any required Determinations and Findings approval*
* *Issuance of synopsis*
* *Issuance of solicitation*
* *Evaluation of proposals, audits, and field reports*
* *Beginning and completion of negotiations*
* *Contract preparation, review, and clearance*
* *Contract award*

# Identification Of Participants

List the individuals who participated in preparing the acquisition strategy, giving contact information for each.

# APPENDIX A – REFERENCES

Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.

The following table summarizes the documents referenced in this document.

| Document Name | Description | Location |
| --- | --- | --- |
| <Document Name and Version Number> | <Document description> | <URL or Network path where document is located> |
| <Document Name and Version Number> | <Document description> | <URL or Network path where document is located> |
| <Document Name and Version Number> | <Document description> | <URL or Network path where document is located> |