



**2.0 - Acquisition Planning & Market Research 2.1 – Market Research**

```

graph TD
    TR1([Finalized Requirements]) --> H1[2.1 Market Research]
    H1 --> F1[2.1.1 Create Market Research Report/1649/88]
    F1 --> D1[Market Research Report]
    F1 --> T2([3.1.2 Completed Market Research])
    F1 --> F2[2.1.1.1 Obtain Program market research, product description, previous contract, acquisition history, END if info is acceptable/complete]
    F2 --> D2[PCO statement that Program MR is acceptable, or decision to perform contracting activity market research--could be email, could be decision--no document/artifact--to proceed to next step]
    F2 --> F3[2.1.1.2 Identify missing information needed to plan acquisition, understand requirement, understand availability]
    F3 --> D3[Decision point more than a deliverable/artifact/document, RFI Draft]
    F3 --> F4[2.1.1.3 Obtain any missing information, add information, ensure timeliness, scope review]
    F4 --> D4[Email, statement from PCO, PDF, Google doc, letter]
    F4 --> D5{CO approves/signs MRR, FAC Council Briefing, Deviation Request}
    D5 --> T3([End])
  
```

**Legend**

- Trigger/End
- High Level Activity
- Functional Tasks
- Policy Guidance
- Functional Task with Sub-Process
- Input to Functional Task
- Output
- Approved By
- Decision
- The Sequence is as Applicable
- Requires Signature
- Generated Document

Trigger Activities

Level 1

2.2.1

2.2.2

2.2.2  
Market Research Report

2.2  
Acquisition Planning

2.2.1  
Determine Socio Economic Opportunities  
(Examples: Consolidation/Bundling, OSBU  
Forecast tool, Small Business 2689  
Coordination, Set Aside Determination)  
FAR 9, FAR 35, FAR 16, FAR 17, FAR 19

Internal Report from  
Contract file, Data source

Market Research Report, FPDS-NG reporting from  
previous contracts, SAM site (often for direct award),  
DSBS, Limited Source Justification (sole source,  
brand name), Consolidated &/or Bundled  
Determination, availability/capability of socio-  
economic concerned vendors (SDV/OSB, WOSB,  
HUBZone, 8a, etc.) (DT) Should include commercial  
market prices and previous sell prices for the  
product(s) (DT)

2.2.1.1  
Receive Client Input, historical considerations,  
limited sources, consolidation &/or bundling  
FAR 6.302, 13, 8, 15, 16, 19 for limiting  
competition, agency specific supplements, FAR  
7.107-2 for consolidation/bundling, GSA Insite  
has guidance, FAR 10, FAR 13, FAR 16, FAR 19  
GSAM 507.107

D&F

CO & Other  
Authorized  
Official

Draft LSJ/rationale for limiting competition, could be  
a memo/other document for the file, CIO approval  
for IT purchase for main IT systems (could be based  
on agency policy), agency ordering priorities/  
mandatory sources, email to SBA representative,  
consolidation &/or bundling determination approval

Within the threshold  
established by  
GSAR 507.107-1(b)

Yes, Approval Needed

Send for Final Approval for  
consolidation &/or bundling  
D&F by SPE, OSBU, OGC &  
SBA

Non approval will go back  
to 1.0

Signed By CO

Email attachment, Already sent  
via OMB MAX--online  
environment, approval/review  
process, generated document,  
APM

Business Case Information, Draft  
Acquisition Plan

2.2.1.2  
Draft GSA Form 2689, if applicable  
FAR 10, FAR 19, GSAM for s thresholds,  
PIB on 2689, 519 502-70, FITARA

Draft  
version of  
2689

Draft version of 2689

Based on s value (unless the  
2689 is being used to  
document market research),  
routing through OSBU and  
SBA for approval, as  
applicable

End

Business Case, Contract  
file, Data source

Established Business Case/  
Approved LSJ/ Approved 2689, SBA  
Office Coordination, Draft RFQ,  
Work statement  
(PDF Format)

GSA Form  
2689

GSA 2689  
CO & Other  
Authorized  
Official

2.2.2.1  
Establish an Acquisition Strategy Session,  
if applicable  
FAR 2, FAR 6, FAR 7, FAR 8, FAR 10, FAR 13,  
FAR 14, FAR 16, FAR 19, GSAM 507

Email approval from acquisition  
strategy council CRB Operational  
Notice QTA-2015-01 Revision 5,  
presentation to the FAS  
Acquisition Council, as applicable.

Contract file, originates from  
client & also includes contract  
activity documentation

Limited sources, contracting  
opportunities -- all manual data  
entry/manual selection of contract  
characteristics

2.2.2.2  
Create acquisition Plan in APM or Simplified  
Acquisition Plan or Reference Previous  
Acquisition Plan (parent / child in APM) or Oral  
Acquisition Plan  
FAR 1, FAR 2, FAR 6, FAR 7, FAR 8, FAR 11, FAR 13,  
FAR 14, FAR 15, FAR 16, FAR 37  
FAS policy 4Q-ACQ-2013-002 Operational Notice:  
QTA-2009-05 -- Revision 6

Does the contract have  
parent/child contracting  
activity?

No

Does the Plan need  
approval based on s Value?  
GSAM 507.105(c)

No

Yes

APM/Offer - established by  
policy, based on s value, FAC  
Council Briefings, OGC IAW  
with ADM 5000.4B

Complete Market Research  
Report (MRR) for file

Approved Acquisition Plan (PDF/APM Web  
Data) fillable PDFs for simplified acquisition  
plans (at least 2 versions (a simplified  
acquisition plan and a regular acquisition  
plan), based on s value)  
FAR 7.102(a) & GSAR 507.104(b)(1)

Acquisition  
plan

CO & Other  
Authorized  
Official

2.2.2  
Create Acquisition Plan IAW FAR Part 7 and  
Agency Supplement  
(Examples: Complete Plan Content such as  
Solicitation Type (e.g., RFQ, RFP, IFB, Task Order),  
Contract Type, Competition, Sources, Source  
Selection, Evaluation Criteria/Trade-Offs, Period  
of Performance, Risks, Milestones, etc.)  
FAR 2, FAR 8, FAR 6, FAR 7, FAR 8, FAR 10, FAR  
13, FAR 14, FAR 15, FAR 16, FAR 37

2.2.3  
Route for Reviews/Approvals  
(Examples: Supervisory, FAS Acquisition  
Council, OGC, SPE, Contract Review Board,  
etc.)  
FAR 7, FAR 16

2.2.4  
Completed/ Approved  
Acquisition Plan

Legend

Trigger/End

High Level Activity

Functional Tasks  
Policy Guidance

Functional  
Task with Sub  
Process

Source of Input  
Input to Functional Task

Output

Approved By

Decision

The Sequence is as Applicable

Requires Signature

Generated Document



| 2.0 - Acquisition Plan & Market Analysis - Glossary         |   |
|---|---|
| Abbreviated Form  | Full Form   |
| ACQ   | Acquisition   |
| APM   | Acquisition Planning Module                           |
| CO  | Contracting Officer                                   |
| CRB   | Contract Review Board                                 |
| CTAG  | Contract Tab Advisory Guide                           |
| DSBS  | Dynamic Small Business Search                         |
| FAC   | Federal Acquisition Council                           |
| FAR   | Federal Acquisition Regulation                        |
| FAS   | Federal Acquisition Service                           |
| FBO   | Federal Business Opportunities                        |
| FPDS - NG   | Federal Procurement Data System - Next Generation     |
| IAW   | In Accordance With                                    |
| IFB   | Invitation for bids                                   |
| IT  | Information Technology                                |
| LSJ   | Limited Source Justification                          |
| MR  | Market Research                                       |
| MRR   | Market Research Report                                |
| OGC   | Office of General Counsel                             |
| OSBU  | Office for Small Business Utilization                 |
| PCO   | Procurement Contracting Officer                       |
| PIB   | Procurement Instructional Bulletin                    |
| QTA   | Office of Acquisition Operations (Office Code is QTA) |
| RFI   | Request for Information                               |
| RFP   | Request for Proposal                                  |
| RFQ   | Request for Quote                                     |
| SAM   | System for Award Management                           |
| SBA   | Small Business Administration                         |
| SPE   | Senior Procurement Executive                          |
| Represents a Name of a System/Application                   |   |
| Represents a Name for GSA's Organization and or Office Code |   |

DRAFT