

# Part 507 - Acquisition Planning

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**Parent topic:** [General Services Administration Acquisition Manual](#)

## Subpart 507.1 - Acquisition Plans

### 507.101 Definitions.

“Planner” means the person residing in the requirements office who initiates, coordinates and prepares written acquisition plans. The person may be in an individual program office or have responsibility for a number of such offices.

“Planning team” means a team of individuals formed to prepare individual elements of an acquisition plan. The team should be comprised of technical and professional representatives from the requirements customer, contracting, budget, counsel, small business technical advisors (SBTA), and other offices as warranted.

“Requirements office” means the internal GSA office that establishes and funds the agency need. If an organization outside of GSA establishes and funds the need, then the requirements office will be the GSA office that is managing the acquisition for that outside organization.

### **507.103 Agency-head responsibilities.**

The HCA must ensure that the planning team adheres to the requirements of FAR 7, Acquisition Planning.

### **507.104 General procedures.**

(a) The planner shall:

(1) Comply with the requirements of FAR Subpart 7.1, and coordinate with other members of the planning team as appropriate.

(2) Write the acquisition plan using all planning team members especially for complex or highly sensitive acquisitions.

(3) Review the acquisition history of the supplies and services.

(4) Review the description of the supplies, including (when necessary for adequate description) a picture, drawing, diagram, or other graphic representation.

(5) Coordinate with the Small Business Technical Advisor (SBTA) as necessary to fulfill the requirements of FAR 7.104(d) (See [519.202-1](#)).

(6) Coordinate with the GSA Chief Information Officer (CIO) if the action involves GSA information technology and ensure acquisition plans are approved by the GSA CIO. Guidance for identifying the applicable GSA CIO point of contact is located on the Acquisition Portal at <https://insite.gsa.gov/itprocurement>. For interagency acquisitions involving information technology, see [subpart 517.5](#).

(7) Obtain concurrence of the contracting officer, and approvals as required in paragraph [507.105\(c\)\(1\)](#).

(8) Coordinate with the Office of General Counsel on an as needed basis, but definitely for plans over \$20 million.

(9) Ensure that an interagency agreement is in place in all agency specific clauses, terms and conditions are incorporated in the acquisition, when conducting purchases on behalf of other agencies.

(10) Follow sustainability policies and procedures specified in [part 523](#) throughout the procurement.

(b) The contracting officer shall:

(1) Ensure that acquisition planning and market research are performed for all acquisitions.

(2) Ensure that the contract file contains a copy of the approved acquisition plan.

(c) *Applicability.* With the following exceptions, all acquisitions, including orders and BPAs, require written acquisition plans.

(1) When awarding a single IDIQ contract or a BPA for a specific requirement and agency, an acquisition plan will be developed for the base contract. The resulting orders should be covered by and reference the same acquisition plan.

(2) Oral plans.

(d) The planner is encouraged to use the Acquisition Planning Wizard (APW) (found at <http://apw.gsa.gov>), or any successor system, for all acquisitions exceeding the SAT. Not later than 7 calendar days after the acquisition plan is approved, if not completed in APW, an electronic copy shall be sent to [acquisitionplans@gsa.gov](mailto:acquisitionplans@gsa.gov).

## **507.105 Contents of acquisition plans.**

(a) *Written.*

(1) The APW contains the format prescribed in FAR 7.105 and shall be used in the preparation of acquisition plans. Where a particular element described in FAR 7.105 does not apply, the acquisition plan should read “not applicable.” The dollar value, complexity (*e.g.*, commercial versus non-commercial item) and method of acquisition (*e.g.*, full and open competition versus task/delivery order) of the supplies and services to be acquired will affect the scope and breadth of the acquisition plan.

(2) FAR 7.106 (*major systems*) and FAR 7.107 (*consolidation, bundling, or substantial bundling*) shall be addressed in the plans, if applicable.

(3) For leasehold interests in real property, a modified version of the contents of acquisition plans for leases is provided in the APW.

(4) The requirement for a written plan may be waived by the appropriate level of an approving official listed in GSAM [507.105\(c\)](#). When the requirement for a written plan is waived, an oral plan is still required. The planner must obtain approval for the oral plan from the approving official.

(5) *Software.* If procuring software, specify the result of any software requirement alternatives analysis that has been completed in accordance with [511.002\(d\)](#).

(b) *Oral plans.* Oral plans are only authorized by approval of the HCA and may be used in unusual and compelling situations. The planner shall document a summary of the oral plan, and shall also include: the name and signature of the approving official; the date the oral plan was approved; and the reason for waiving a written plan. The summary shall be included in the official contract file. In addition, the summary should be a part of, or attached to, any justification for other than full and open competition as required by FAR 6.302, or in the basis for using an exception to the fair opportunity process required by FAR 16.505(b)(2). The summary may be prepared after award if preparation before award would unreasonably delay the award, such as in the case of circumstances warranting the use of a letter contract.

(c) *Approval thresholds.*

(1) The following are the dollar value thresholds and the level of the approving official for

approving acquisition plans or waiving written plans. For purposes of leasing, the Simplified Leasing Acquisition Threshold (SLAT) is defined in [part 570](#). The HCA may authorize higher level approving officials for the thresholds set out below.

<b>Threshold</b>	<b>Approving Official</b>
Below the SAT (SLAT for leases)	Contracting Officer
SAT (SLAT for leases) to, and including, \$6 million	One Level above the Contracting Officer
Over \$6 million to, and including, \$20 million	Contracting Director
Over \$20 million	HCA

Note: Thresholds shall include all options.

(2) If the acquisition meets one of the following criteria and is greater than the SAT, the planner must obtain HCA approval of the plan:

(i) Complex, critical to agency strategic objectives and mission, highly visible or politically sensitive.

(ii) An acquisition with which GSA has little or no experience that may result in a need for greater oversight or risk management.

(iii) Actions using significantly changed methods (*e.g.*, methods of procurement such as lease versus purchase, or methods of performance such as contractor versus Government personnel).

(iv) New construction or repair, lease prospectus and alteration prospectus budget line items.

(v) Any acquisition that involves-

(A) Consolidation above \$2 million (FAR 7.107-2); or

(B) Bundling at any dollar value (FAR 7.107-3)

(3) Acquisitions requiring additional transactional data reporting elements to those listed in subparagraph (b)(2) of clauses [552.216-75](#) and [552.238-80](#) Alternate I-

(i) Must be coordinated with the applicable category manager, and obtain approval by the HCA and SPE; and

(ii) Must provide the information at 501.304(b)(4) in the rationale for adding

transactional data reporting elements.

(iii) The approval requirements in this subparagraph do not apply to additional data elements added to a task/delivery order or blanket purchase agreement. However, coordination with the applicable category manager is required.

## **507.107 Additional requirements for acquisitions involving consolidation, bundling or substantial bundling.**

### **507.107-1 General.**

#### *(a) Applicability*

(1) The contracting officer must determine if the requirement is considered consolidation, bundling or substantial bundling per the definitions in FAR 2.101(b) and 7.107-4. Additional guidance on the definitions is available on the GSA Acquisition Portal (<http://insite.gsa.gov/consolidationbundling>).

(2) Construction Indefinite-Delivery, Indefinite-Quantity (IDIQ) Contracts.

(i) When establishing an IDIQ contract for construction and the number of discrete sites is unknown, the contracting officer has the discretion to assess the construction requirements for consolidation at either the IDIQ or task order (TO) level. A consolidation analysis should not be performed at both levels.

(ii) Each acquisition plan and GSA Form 2689, as applicable, must address if a consolidation determination was or will be made at an IDIQ or TO level.

(b) *Thresholds for Written Determination.* Notwithstanding exceptions per FAR 7.107-1(b), a written determination is required for—

(1) Consolidation requirements above \$2 million; and

(2) Bundling requirements at any dollar value.

#### *(c) Approvals for Written Determination.*

(1) The contracting officer shall obtain approvals as required by the Service prior to the Associate Administrator, Office of Small Business Utilization (AA OSBU) and the Senior Procurement Executive (SPE).

(2) The contracting officer shall coordinate with the GSA Office of Small Business Utilization (OSBU) for AA OSBU's approval prior to the SPE's approval.

(3) Review and approval guidance can be found on the GSA Acquisition Portal (<http://insite.gsa.gov/consolidationbundling/approvals>).

#### *(d) Contents of Written Determination for Consolidation.*

(1) The contracting officer must provide the following information, which includes the

requirements at FAR 7.107-2:

- (i) Brief description of the acquisition history.
- (ii) Description of the market research conducted.
- (iii) Identification of any alternative contracting approaches that involve a lesser degree of consolidation of contract requirements.
- (iv) Identification of the contracting approach selected.
- (v) Identification of any negative impacts to small business concerns.
- (vi) Description of steps taken to include small business concerns in the acquisition strategy.
- (vii) Explanation of the substantial benefits.
- (viii) Statement that the consolidation and/or bundling is necessary and justified.

(2) Additional consolidation and bundling guidance is available on the GSA Acquisition Portal ( <http://insite.gsa.gov/consolidationbundling> ).

(e) Additional Contents of Written Determination for Bundling.

(1) The contracting officer must provide the information required by paragraph (e)(2) of this subsection in addition to paragraph (d) of this subsection when the requirement is considered bundling (see FAR 2.101). The additional information listed in this paragraph includes the requirements at FAR 7.107-3.

(2) The contracting officer must use market research to determine prices the Government could have been or could be charged by a small business for the work previously performed by other than small business(es) (see FAR 7.107-3(g)).

(f) *Additional Contents of Written Determination for Substantial Bundling.*

(1) The contracting officer must provide the following information in addition to paragraphs (d) and (e) of this subsection when the requirement is considered substantial bundling (see FAR 7.107-4).

(2) The contracting officer must provide the following information, which includes the requirements at FAR 7.107-4(b):

- (i) Explain the rationale for not selecting each alternative contracting approach with a lesser degree of consolidation.
- (ii) Identify the specific impediments to participation by small business concerns as contractors, including any relevant socioeconomic subcategories.
- (iii) Explain any actions designed to maximize small business participation through teaming.
- (iv) Explain any actions designed to maximize small business participation through subcontracting, including suppliers.

(g) *Substantial Benefits Reporting.*

(1) The contracting officer must monitor and measure actual savings throughout the acquisition life cycle, and report realized substantial benefits to the SPE.

(2) Realized substantial benefits shall be reported:

(i) Within 14 calendar days after award of the contract.

(ii) Within 30 calendar days after completion of the contract.

(iii) During contract performance as requested by the SPE on a case by case basis.

(3) Reporting guidance is available on the GSA Acquisition Portal (<http://insite.gsa.gov/consolidationbundling>).

**507.107-5 Notifications.**

(a) Notification to public of rationale for consolidated, bundled or substantially bundled requirement.

(1) A summary notification of a determination that a consolidated, bundled or substantially bundled requirement is necessary and justified will be published by the SPE on the GSA public website at <http://insite.gsa.gov/consolidationbundling>. The notice will be posted within 7 days of the SPE approved determination.

(2) Any solicitation related to the consolidation, bundled or substantially bundled requirement can only be published after the summary notice from subparagraph (a)(1) of this section has been published for at least 7 days.

(3) The contracting officer is encouraged to provide the summary notification from subparagraph (a)(1) of this section to the Governmentwide Point of Entry (GPE) before issuance of the solicitation.

(4) The contracting officer shall publish the SPE approved determination with the publication of the solicitation, redacted as necessary.

(5) For bundled or substantially bundled requirements, in addition to the requirements of this subsection, the contracting officer must verify compliance with the notification requirements of FAR 7.107-5(b).

(b) Notification to SBA of follow-on consolidated or bundled requirements.

(1) The contracting officer shall coordinate with the designated SBTA (see [519.4](#)) to provide follow-on notification to the SBA PCR in accordance with FAR 7.107-5(c). The designated SBTA will provide notification to the AA OSBU.

(2) The SBTA will submit the notification to SBA PCR within 5 business days of receiving the notification from the contracting officer or request an extension from the contracting officer.

# **Subpart 507.5 - Inherently Governmental Functions**

## **507.503 Policy.**

(a) Concurrent with the transmittal of each statement of work or any modification to a statement of work for a service contract, the requirements office must provide the contracting officer a written determination that none of the functions to be performed are inherently governmental as defined in FAR 7.5. The determination must include a statement that the requirement is not for functions similar to those listed under FAR 7.503(c).

(b) The requirements office must also review the examples of functions listed under paragraph (d) of FAR 7.503. While these functions are not inherently governmental, they may restrict the discretionary authority, decision-making responsibility, or accountability of Government officials using the contractor services or work products. If the services to be acquired may cause such restrictions, the acquisition plan must discuss the associated vulnerabilities, and address management controls to mitigate them.

(1) These measures may include requiring special controls and safeguards to prevent improper personal services relationships, contractor personnel access to privileged or sensitive information, and/or confusion regarding the mistaking of contractor employees for Federal employees.

(2) The requirements office is directed to use FAR 37.104 and 37.5 and OFPP Policy Letter 93-1 for guidance in addressing these considerations.

(3) The HCA resolves any disagreement regarding the requirements official's determination, following the guidelines in FAR 7.5. The HCA may delegate this authority to a level not lower than the contracting director.

# **Subpart 507.70 - Additional Requirements for Purchases in Support of National Security Systems involving Weapons Systems**

## **507.7000 Scope of subpart.**

This subpart prescribes acquisition policies and procedures for use in acquiring information technology supplies, services and systems in support of a weapon system as part of a national security system, as defined by FAR 39.002.

## **507.7001 Policy.**

(a) Although GSA's mission does not include the direct acquisition of weapon systems on behalf of the Department of Defense (DoD), GSA contracting activities may procure information technology supplies, services and systems in support of a weapon system, which is part of a national



security system (*e.g.*, components, services to install and maintain weapon systems, ancillary items and services) when responding to a bona-fide requirement received from a requiring agency or program office.

(b) Contracting Officers shall ensure that all requiring agency regulations and the policies and directives of The Committee on National Security Systems at [www.cnss.gov](http://www.cnss.gov) are incorporated during the acquisition planning stage and are met before acquiring information technology supplies, services and systems in support of a weapon system as part of a national security system.

(c) Employees responsible for or procuring information technology supplies, services and systems in support of a weapon system shall possess the appropriate security clearance associated with the level of security classification related to the acquisition. They include, but are not limited to contracting officers, contract specialists, project/program managers, and contracting officer representatives.