U.S. Department of Energy

Project Name

Acquisition Plan

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TEMPLATE

U. S. DEPARTMENT OF ENERGY

Organizational Title 1
Organizational Title 2

Change Control Page

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Title Page

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U.S. DEPARTMENT OF ENERGY

Organizational Title 1
Organizational Title 1

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Preface

Document Version Control: It is the reader's responsibility to ensure they have the latest version of this document. Questions should be directed to the owner of this document, or the project manager.

This document was generated by the ***Project Name*** project team. ***System/Project Name*** will be developed for the ***Organizational Name*** of the U.S. Department of Energy.

Lifecycle Stage: ***Project Name*** is in the Construction stage of the project lifecycle.

Approval: ***A completed stage review/exit will constitute approval of this document.***

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Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved in the ***Project Name*** project or who will become involved during the lifecycle.

1. Introduction

Describe the purpose of the acquisition plan, and the organization of the document.

1.1 Scope

Describe the acquisition strategy, inclusive of development and operational factors (e.g., size, speed and capabilities of hardware, software, and/or telecommunications equipment) method(s) of acquisition, selection process, constraints, etc.

1.2 Objectives

Describe the objectives of the acquisition plan. These objectives may include factors/rationale which must be specified/explained when telecommunications equipment, a piece of hardware, or packaged software must be acquired.

1.3 Background

Provide a general description of the system for which the acquisition plan will be implemented.

1.4 References

Identify sources of information used to develop this document, such as IEEE or project documentation.

2. Acquisition Strategy

This section should describe the development factors, constraints, and selection process by which the equipment is obtained. Note: If the acquisition activity requires multiple components (hardware, software, and/or telecommunications equipment), the strategies, and factors may differ depending on the component. If so, this section (Section 2) should be repeated for each class of component.

2.1 Strategy Development Factors

Identify the factors which must be considered (e.g., size, speed, availability, etc.), and which may impact on the selection of a specific strategy.

2.1.1 Existing Products

If applicable, describe the ability (or inability) of the of currently used products to meet the project's requirements. If existing products are deemed inadequate or lack capacity, quantitative supporting information should be presented.

2.1.2 Constraints

Identify any constraints that may affect the acquisition process. These may include existing Federal or state regulations, budget, required approvals, lead times, etc.

2.1.3 Method of Acquiring New Products

Identify the method(s) by which new products will be obtained. These may include the following:

- Lease vs. Purchase -The benefits of leasing versus purchasing should be examined and documented. Factors to be considered are cost over the projected life of the project, obsolescence, future expansion, etc.

- General Service Administration (GSA) Schedule - Products on the GSA schedule should be considered because of the ease and speed of acquisition and cost.

- Request For Proposal (RFP) - The need for an RFP and instructions for its proper preparation should conform to organizational policy and procedure.

- Sole Source - Sole source procurement should conform to organizational policy and procedure, and should be approved by the appropriate authority.

- Interagency Agreement - Often one government agency can make a large purchase of equipment and transfer part of the order to other agencies in return for a transfer of funds. This method may reduce the cost to the government and facilitate the acquisition process.

2.2 Selected Acquisition Strategy

This section should outline the acquisition strategy that has been chosen to meet the needs of the project.

2.2.1 Method of Acquiring the Product

Describe the method chosen and give the rationale used.

2.2.2 Regulations

Identify and describe the regulations that support the acquisition.

2.2.3 Source of Funds

Identify the source(s) of funds for the acquisition. May include information related to the budget, accounting codes, etc.

2.2.4 Approvals

Identify or list the organizational elements or officials who must approve the strategy.

2.2.5 Lead Time

Identify the project lead times for each phase of the acquisition process. The date when the product must be available and operational should be included.

2.2.6 Procurement Schedule

Provide schedule information that includes all of the relevant procurement activities (may be attached). The selected acquisition strategy should be integrated into the project plan to ensure that the delivery date(s) coincides with the planned implementation of the system.

3. Hardware Specifications

This section should address hardware compatibility and also describe the type of processing equipment, communications, special equipment, support services and site preparation required.

3.1 Hardware Compatibility

Identify any hardware compatibility issues that may impact the acquisition process. Be specific in terms of types of hardware, vendors, versions, software operating system, etc.

3.2 Processing Equipment

Identify the requirements needed to run the proposed system. The requirements may include the type, size, speed, intended site, and quantity of the equipment. Manuals needed for proper setup, operations, maintenance or cleaning should also be specified.

3.3 Communications

Provide a detailed description of the communications equipment (related software), services and facilities required by the system. If applicable, this may include information on existing or proposed networks and infrastructure.

3.4 Special Equipment

Identify any special equipment that must be acquired, such as emergency power generators, etc. Specify the date required, possible sources, and estimated costs, as well as the person or staff responsible for overseeing the equipment.

3.5 Support Services

Identify the support services, if applicable, that are required to install and maintain the hardware and software. Such services may include repair, maintenance and training.

3.6 Site Preparation

Identify the sites or facilities that will require modification or preparation in order to receive the computer or communications equipment, hardware or software. Briefly describe the nature of the required modifications.

4. Software Specifications

This section should describe the required capabilities, features, and capacity of the software. It should also address hardware compatibility issues, system documentation, training, and maintenance of the system.

4.1 Required Capabilities and Features

List the required capabilities of the software. In most instances, the capabilities should be determined before evaluating the various packages or products. It is suggested that weighing factors be developed to allow separation of mandatory requirements from desirable ones.

4.2 Capacity

Some software becomes less efficient when handling large volumes of data. Estimate as accurately as possible, the volumes of data that will be handled after the system is running for several years.

4.3 Documentation

Identify the manuals that will be necessary for proper installation and operation of the software. Availability, cost, and quality of the manuals are factors that should be considered.

4.4 Training Program

The training of users of software should be considered in the statement of requirements (inclusive of initial and follow up training, and source(s) of training materials).

4.5 Maintenance Features

Describe the potential vendor's method (support) of handling errors or "bugs" in the software, as well as the Department's method, if applicable. Revisions or updates to the software, as well as access to backup copies, should also be considered.

4.6 Sources

Based on the required capabilities, the statement of requirements should include the potential sources of products. The source information should include, at a minimum, the manufacture and/or distributor names, lead times, and estimated costs.