**Limited Acquisition Plan – Template**

An acquisition plan for a UESC will address project-specific technical objectives and business considerations and identify the milestones in the acquisition process.[[1]](#footnote-1) The CO will also ensure that agency acquisition policies, guidance, and practices are followed.

As an example, DOE’s *Guiding Principles of Acquisition Planning* encourages

* an integrated team approach with representation from all organizations having an interest in the project,
* use of appropriate streamlining techniques; compliance with statutory, regulatory, and policy requirements, and
* reflecting the mission needs of the program.

DOE’s Acquisition Guide allows for the submission of a utility procurement plan, the functional equivalent of an acquisition plan for ECMs or demand-response services from the serving utility. Therefore, DOE will satisfy its FAR Subpart 7 (Acquisition Planning) requirement for acquisition planning with an approved utility procurement plan.[[2]](#footnote-2)

A *Limited Acquisition Plan* template is provided on the following pages, and a sample UESC-specific acquisition plan is available on request.

**Limited Acquisition Plan   
Template**

PROJECT TITLE:

LOCATION:

SOLICITATION NO.:

1. Acquisition Background and Objectives
   1. Statement of Need

In accordance with Section 152 of the Energy Policy Act of 1992 (EPACT), Public Law No. 102-486, 42 USC 8256 (c) Utility Incentive Programs:

(1) Agencies are authorized and encouraged to participate in programs to increase energy efficiency and for water conservation or the management of electricity demand conducted by gas, water, or electric utilities and generally available to customers of such utilities.

(2) Each agency may accept any financial incentive, goods, or services generally available from any such utility, to increase energy efficiency or to conserve water or manage electricity demand.

(3) Each agency is encouraged to enter into negotiations with electric, water, and gas utilities to design cost-effective demand management and conservation incentive programs to address the unique needs of facilities utilized by such agency.

(4) If an agency satisfies the criteria which generally apply to other customers of a utility incentive program, such agency may not be denied collection of rebates or other incentives.

The *Agency* was given the authority to procure utility energy management services to reduce energy and water consumption and manage electricity demand directly from its gas, water, or electric utility supplier. The Federal Acquisition Regulations (FAR) Part 41 dictates how utilities will be procured.

* 1. Applicable Conditions
  2. Cost
  3. Capabilities
  4. Delivery/performance period Requirements
  5. Trade-Offs
  6. Risks
  7. Acquisition Streamlining

1. Plan of Action
   1. Sources
   2. Competition:
   3. Source Selection
   4. Acquisition Considerations
      1. Contract Type
      2. Special Contract Clauses:
      3. Negotiated procurement.
      4. Lease or Purchase equipment:
      5. Miscellaneous contracting considerations:
      6. Performance Based Contract:
   5. Budgeting and Funding:
   6. Product or Service Description:
   7. Priorities, Allocations, and Allotments:
   8. Contractor vs. Government Performance:
   9. Inherently Government Functions:
   10. Management Information Requirements:
   11. Make or Buy:
   12. Test and Evaluation:
   13. Logistics Considerations:
   14. Government Furnished Property:
   15. Government-furnished information:
   16. Environmental and Energy Conservation Objectives:
   17. Security Considerations:
   18. Contract Administration:
   19. Other considerations:
   20. Milestones for the Acquisition Cycle:
       1. Acquisition Plan Approval:
       2. Solicitation Issue Date:
       3. Solicitation Close Date:
       4. Technical Proposals:
       5. Technical Evaluations/Awards:
       6. Reverse Auction Period Begins:
       7. Reverse Auction Period Ends:
       8. Contract Awards:
   21. Identification of Participants in Acquisition Plan preparation:

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CO Date

Concurrence/Approval:

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1 level above CO Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2 levels above CO Date

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General Counsel Date

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Senior Acquisition Authority Date

1. FAR Part 7, Acquisition Planning, governs the process for federal procurements. [↑](#footnote-ref-1)
2. DOE guidance on acquisition planning, Guiding Principles of Acquisition Planning, is available at <http://energy.gov/management/downloads/acquisition-guide-0>. [↑](#footnote-ref-2)