

DRMS INSTRUCTION 4105.2

DRMS-~~PO~~

March 21, 2001

PROCEDURES FOR PREPARATION OF REQUESTS FOR SUPPLIES AND SERVICES
(This publication has been revised significantly and must be reviewed
in its entirety.)

- A. REFERENCES. DRMS Instruction 4105.2, Procedures for Preparation of Requests for Supplies and Services, October 28, 1996, (hereby superseded).
- B. PURPOSE. This instruction provides guidance for the preparation of requests for supplies and services obtained through local procurement (DRMS-~~POB~~).
Supersedes reference A.
- C. APPLICABILITY AND SCOPE. This instruction applies to all customers of **DLIS-R** and DRMS-P for purchase of supplies and services.
- D. DEFINITIONS. (Reserved for future use.)
- E. PROCEDURE. The procedures for preparation of requests for supplies and services are enclosed.
- F. RESPONSIBILITY. The responsibilities of key officials are shown at enclosure **1** to this instruction.
- G. EFFECTIVE DATE AND IMPLEMENTATION. This instruction is effective **upon signature by the DRMS Executive Assistant.**
- H. INFORMATION REQUIREMENTS. (Reserved for future use.)

BY ORDER OF THE COMMANDER

1 Encl

/s/
JANINE DES VOIGNES
Executive Assistant

PROCEDURES FOR PREPARATION OF REQUESTS FOR SUPPLIES OR SERVICES

A. REQUESTING ACTIVITY:

1. The requesting activity is responsible for:

- a. Ensuring **supplies or services** are **the** minimum essential **requirement** and fully justified.
- b. Providing adequate specifications or statement of work **for services**.
- c. Ensuring all approval levels are met.
- d. Providing adequate documentation.
- e. Coordinating with the resource personnel to assure adequate funding is available.
- f. Submitting requirements timely to preclude mission failure.

2. Mission Essential. It is the requesting activity's responsibility to ensure all items are essential to the completion of the assigned mission.

3. Justification.

- a. Justification for supplies or services must clearly show that the requested items are mission essential.
- b. If a similar item is available through Government sources of supply, the justification must state the reason the similar item will not suffice.
- c. If professional or consultant services (expert) services are required, special documentation is essential to obtain approval from HQ DLA. DRMS-POB will provide full details and assistance upon request.
- d. Other than full and open competition requires special justification. If supplies or services are available from only one source, or from a limited number of sources, and no other type of service will satisfy the requirements, it is possible to obtain the items without providing for full and open competition. Requiring personnel are responsible for providing and certifying as accurate and complete the necessary data to support the recommendation for other than full and open competition. Procuring supplies or services in this manner requires special approvals. Therefore, the data must be complete and accurate.

4. Specifications/Statement of Work.

- a. An inaccurate description of the required supplies or services will result in delay in receiving the items and may result in receiving items that do not fully meet the requirement.
- b. If requesting a supply item, **provide the brand name of the item and the manufacturers part number if known**. If an item is to be used on equipment, specify the equipment. **When DRMS-POB is acquiring a brand name item, firms may offer an equal product to the brand name and the Government will be obligated to evaluate if the product is truly equal unless special justifications under 3c are obtained. Should this situation occur, DRMS-POB will contact the requester.**
- c. For one-time service acquisitions, state the equipment make or model, what appears to be the problem, where the equipment is located, to whom service personnel will report, and the time the service personnel would have access to the equipment, as well as a point of contact. If the requesting activity has information regarding the service to be performed, include the information.

d. If submitting requests for annual maintenance of equipment, a statement of work must accompany the purchase request (PR). The statement of work must include, but is not limited to:

- (1) Frequency of maintenance required;
- (2) Time of day the maintenance is required;
- (3) Days of the week maintenance is required (i.e., if the equipment is in use 24 hours-per-day, 7 days-per-week, maintenance coverage should be the same);
- (4) The type of maintenance required, i.e., remedial and/or preventive. If preventive maintenance is required, the time of day and frequency;
- (5) Equipment to be maintained, including serial number;
- (6) Response time required for remedial maintenance; and
- (7) Any other information that would be helpful, such as whether a field service report is required after each call.

e. When submitting requests for other types of service, a statement of work is required with a complete description of the services to be performed.

5. Approval Levels and Adequate Documentation:

a. All approvals must be obtained and annotated on the PR or supporting documentation prior to submission to **DLIS-R**.

b. PRs received without proper approvals will be returned to the requester. This results in delays in the acquisition process.

c. The following, as a minimum, require special review and approval prior to **input into** the Base Operating Support System (BOSS).

- (1) Office Equipment Services (**DLIS-R**).
- (2) Training Services (**DRMS-KM**).
- (3) Equipment, furniture, and accountable property (Accountable Property Officer).
- (4) Subscriptions (Publications and Audiovisual Management Assessment Review Committee).
- (5) Visual aids, production, photo or graphics services, video tapes, audiovisual equipment (Visual Information Control Officer).
- (6) Automated Data Processing (ADP) equipment. In **DLIS**, all ADP requests must be submitted through **DLIS-V**, in DRMS all ADP requests must be submitted through DRMS-C.
- (7) Systems furniture (**DRMS-RW** or **DLIS-R**).
- (8) **DLIS** requests estimated over \$50,000 must be approved by the Financial Management Board.

d. All PRs must be signed by an authorized individual (division chief or above) and submitted to **DLIS-RW** for input to BOSS, if funding is in BOSS.

e. All PRs must contain the following:

- (1) All required information for BOSS input and accountability.
- (2) Funding citations (organization code, cost code, object class).
- (3) Unit of issue, quantity, unit price.
- (4) Customer identification number.
- (5) Point of contact and telephone number.
- (6) Recommended service.

6. Adequate funding and Timely Submission. The requesting activity is responsible for coordinating with resource personnel to ensure that funding is available in BOSS prior to submitting the PR. Failure to ensure adequate funding is in the BOSS will result in delays. Proper planning and early submission of PRs is essential to allow adequate time for processing the acquisition.

B. Directorate of Planning and Resource Management (DLIS-R) will:

1. Review all requests for supplies and services to ensure approval levels are met.
2. Review all requests for appropriate information.
3. Return requests for further action when appropriate.
4. Input the request into BOSS.
 - a. A separate BOSS document must be input for each line item requested.
 - b. BOSS generates the UVSF 549 report for DRMS-POB.
5. Assign a priority code based on the requested delivery date.
6. Assign Federal Stock Classification/National Stock Number.
7. Provide any back up documentation received to DRMS-POB.
8. Assure accurate and auditable record keeping is accomplished.

C. Operational Contracting Branch (DRMS-POB) will:

1. Review all requests for adequacy of specification.
2. Ensure proper justifications and approvals accompany any special requirements.
3. Suspend and return requests for more information when necessary.
4. Initiate procurement action.
5. Maintain this instruction in a current status and review it biennially.

D. GENERAL:

1. DRMS-POB will not change a PR without written **or verbal** authorization from the requesting office.
2. **The requester will be contacted if it has been determined that the PR is inaccurate and a written response to correct the PR will be required.**
3. Quantity changes will be made in DRMS-POB when necessitated by a standard pack or to meet minimum order quantities. The requesting office will be notified.
4. Requesting offices receive BOSS report 521A, which provides status of PRs. If requesting information from DRMS-POB, the BOSS document number or purchase order number is required.

E. PROCUREMENT ADMINISTRATIVE LEAD TIME (PALT):

1. DRMS-POB will exert every effort to ensure timely delivery of supplies and services to requesting activities.
2. To aid DRMS-POB in processing PRs, requesting activities must submit PRs timely.

3. The timeframe from the date of receipt of an accurate, complete procurement request to the date a contract is awarded is referred to as the PALT. The following is a guide to aid requesting offices in submitting PRs **and acquiring the supply or service** in a timely manner:

a. Emergency PRs are usually accomplished in 1 to 3 days.

b. PRs under **\$25,000 or at any dollar value if acquired from a Federal Supply Schedule (e.g. GSA) with low price as the only award criteria**, can be accomplished in 5 to 10 days.

c. PRs **valued between \$25,000 and \$100,000 and for which a Commerce Business Daily (CBD) notice** is required, can normally be accomplished in 45 to 60 days.

Note: FSS orders are exempt from a CBD notice.

d. PRs over **\$100,000 and not acquired under a FSS with price as the only award criteria** normally take a minimum of 120 days.

4. PALT does not begin until an accurate, valid, funded PR is received.

5. FAR prohibits splitting requirements into smaller quantities to avoid approval levels or competition requirements.

6. **Providing with the PR a recommended source and any quotes obtained for a supply or service will lead to a shorter PALT. Before award of a contract DRMS-POB must try to obtain three quotes for the supply or service. If a requester has asked for three quotes prior to submitting the PR to DLIS-RW for input into BOSS, attaching the three quotes will lead to a shorter PALT than one where fewer than three quotes have been provided.**

7. **All contractors who do business with DoD must be registered in the Central Contracting Registration (CCR). Prior to awarding a contract, DRMS-POB must verify that the contractor is registered in CCR. Providing a recommended source who is not registered in CCR, and where DRMS-POB cannot find a source registered in CCR with a lower price, will lead to a longer PALT. To lessen PALT, requesters may check the CCR status of their recommended sources by searching the CCR database on the Internet at www.ccr2000.com. If the requester cannot find the firm in CCR, they can direct the recommended source to the CCR web site so the source can register their company. However, the requester must notify the firm that registering in CCR does not mean they will be awarded the contract as a Contracting Officer in DRMS-POB makes the final determination of who will receive award of the contract.**

8. **All supplies or services valued between \$2,500 and \$100,000 that are not acquired from a FSS are automatically set-aside for small businesses. If a request for a supply or service is provided with a large business as the recommended source, DRMS-POB is obligated to find small business sources for the supply or service and depending on the price differential, may be required to pay more money to the small business than what the large business may have quoted for the supply or service.**

F. Acquisition Planning:

1. Acquisition planning parallels resource planning and begins with the requesting activity.
2. Timely submission of requirements is essential to meet delivery requirements.
3. Accuracy of specifications and adequate funding is essential to assure timely delivery and to acquire quality products that meet the need of the agency.
4. Proper approval levels are essential in meeting mission requirements.

G. Unauthorized Commitments:

1. Any person creating an unauthorized commitment can be held personally liable for the expense incurred.
2. Unauthorized commitments are costly and time consuming to process.
3. Emergency PRs are processed immediately. Use of this procedure prevents unauthorized commitments.

H. Emergency Acquisitions:

1. Emergency requests are given a 00 priority and are used to preclude imminent mission failure.
2. These requests require the approval of the highest organizational element of the requesting activity.
3. Emergency requirements are given special priority in DRMS-POB and other work is delayed in order to fulfill these requirements.