

## Procurement Requests 12-5.03-P

PREPARE a procurement document, manually or electronically, as presented in the E-PME Study Guide.

- Accounting Data
- Limitations

### *Procurement Requests*

The Procurement Request/Process Rapidly (PR) is the funding document that provides the Contracting Officer (KO) with the authority to begin the acquisition process. In order for the requisition to be valid, it must:

- Be numbered properly
- Contain appropriation and accounting data
- Have a valid signature

In addition, the following data must be provided with the funding document:

- Government estimate
- Statement of work
- Specifications and drawings

The following items must be contained on, or forwarded with the PR. Select each bulleted item for clarification of that item.

- **Local approvals.** The request needs to go through the chain of command to the individual(s) who approves the purchases for that office.
- **Certification of funds availability:** This is the single most important signature on the PR. Nothing can be purchased unless this certification has been made on the PR.
- **Purchase description.** A description of the essential physical characteristics and functions required to meet the government's needs. Specifications, Statement of Work, drawings, etc., should accompany the PR.
- **Required delivery date.** A realistic delivery date. Instead of "ASAP," provide the date the supply/service is really required.

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(continued)***

- **Suggested source(s) of supply.** The source(s) identified on a PR are *suggested* only. The KO and ONLY the KO is responsible for source selection.
- **Justification for Other than Full and Open Competition (JOTFOC), if applicable.** If a “sole source” procurement is the only way to meet the Government’s needs, the PR must be accompanied by a JOTFOC.
- **Property review and general purpose property statement.** All procurement requests (except those for services) need to contain one of the property statements as defined in the Property Management Manual (PMM), COMDTINST M4500.5 (series).
- **Evidence of unit hazardous material coordinator or Pollution Prevention Coordinator (PPC) review, if applicable.** PRs for purchasing hazardous material must be reviewed by the unit PPC. The PPC must sign the PR to verify that he or she has reviewed the PR. Additional requirements for the purchase of these items may be found in Chapter 9, Special Procurement Categories.
- **Requisitioner determination form, if applicable.** Every PR that contains items that can be made with recycled materials needs to include this completed form.
- **Independent Government Estimate (IGE).** IGEs can be derived from market research, published catalogs, price lists, recent purchases, etc. The dollar value and nature of the procurement should govern amount of detail.

If you suggest that a “sole source” procurement is the only way to meet the Coast Guard’s needs, the PR needs to be accompanied by a JOTFOC. The JOTFOC is the written determination to restrict competition.

The JOTFOC must demonstrate that the suggested source is the only supplier in terms of urgency, exclusive licensing. The complexity and detail of the JOTFOC should be commensurate with the complexity of the procurement.

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There are several issues to consider when completing the PR.

- **Does the PR contain items made with recycled materials?** If the PR contains items designated by the EPA as items that can be made with recycled materials, complete Enclosure 23 to COMDTINST M4200.13 (series), Requisitioner Determination: CG Procurement Preference Program for Recovered Materials, and submit with each purchase. The Simplified Acquisitions Manual (SAP), COMDTINST M4200.13 (series), pages 9-7 through 9-9 list the materials that meet the EPA standards.
- **Is this a micro purchase?** A micro purchase for the acquisition or **supplies** shall not exceed \$3,000.00. A micro purchase for the acquisition for **services** shall not exceed \$2,500.00. If the total amount of the purchase exceeds the micro purchase threshold (\$3,000.00 for supplies or \$2,500.00 for services) then three price quotes shall be required.
- **Is the product more than \$3,000.00?** If a product is more than \$3,000.00, you need only to provide a single source of supply and a price. Supply does not have to purchase the product from the source you provided. Contracting officers are required to check federal agencies prior to purchasing the item on the open market.
- **Is this a construction request?** PRs for construction requests are limited to \$2,000.00.

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***Preparing the PR***

To meet this performance requirement, properly prepare the PR for the following scenario:

*You are currently stationed aboard CGC NORTHLAND (WMEC 904) and are tasked to requisition a dozen life vests for the deck department. After finding a reliable product source, you need to complete a Procurement Request.*

You need only to complete blocks 1 through 4 and 6 through 10 of PR form (DOT F 4200.1.2CG) to satisfy this requirement. The PR can be found in the Additional Resources section of this E-PME Study Guide.

After completing the PR, present it to your supervisor.

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