

The background of the slide is a close-up, slightly blurred image of the American flag, showing the stars and stripes. The text is overlaid on this background.

# **MCIEAST CONTRACTING DEPARTMENT**

**SSgt Coleman**

**March 20, 2013**

**Procurement Planning Briefing**

# Purpose:

- The purpose of this training is to enable our customers, responsible for submitting Procurement Requests (PRs) on behalf of an activity, to produce a complete, accurate, and funded PR package to the Regional Contracting Office–MCIEAST (MCIEAST-RCO) via PR Builder.

# Overview

- Competition
- Purchase Request Screening
- Mandatory Sources
- PR Waivers & Approvals
- Procurement Planning
- Brand Name / Brand Name or Equal
- Sole Source
- Purchase Description
- Tips to Speed Procurement
- Commercial Training
- Purchase Request Priority Codes
- Urgency Impact Statements
- Website/POCs

# Competition

- Policy:
  - FAR 6.101
- Why:
  - Contracting Officers shall provide for full and open competition through use of the competitive procedure(s) that are best suited to the circumstances of the contract action and consistent with the need to fulfill the Government's requirements efficiently.

# Purchase Request Screening

- All PR's must be screened by the requesting unit for availability from Government supply channels. Open market purchases can be made only when requirements cannot be obtained from required Government sources of supply.
- Properly screened PRs have higher approval rates and faster procurement times.

# Purchase Request Screening

- Identify your need by conducting
  - Market Research
- 1. Get the Contracting Office involved early in your planning phase.
- 2. Apply & receive required waivers PRIOR to PR submission

# Mandatory Supply Sources

Federal Acquisition Regulation (*FAR*) 8.002

## Supplies

- Agency Inventories: Material Operation Center (MOC), then General Service Administration (GSA) (Camp Lejeune GSA).
- Excess from other agencies
- Products available through
  - National Institute of the Blind (NIB)
  - National Institute of the Severely Handicap (NISH)
- Wholesale supply sources, such as stock programs of the GSA, the Department of Veterans Affairs, and military inventory control points;
- Federal Supply Schedules (GSA Schedules)
- Commercial sources (including educational and nonprofit institutions)

# PR Waivers & Approvals: IT

- ▶ Information/Technology: MARADMIN 375/11:
- ▶ Includes all computers, ancillary equipment, software, firmware & services related to these resources outside the NMCI contract.
- ❖ Make sure ALL tactical equipment and IT requirements are reviewed by II MEF G4
- ❖ Ensure that you attach the II MEF G4/G6 Waiver Form to PRBuilder.

# Procurement Planning

## Conduct Market Research:

- Do enough research to understand and define the requirement
- Become familiar with important performance parameters
- The more you do, slows the acquisition. Contracting will also do market research

## Myth:

*Contracting requires the customer to identify 3 sources of supply.*

# Brand Name Justifications

- FAR 11.105 states that agency requirements shall not be written so as to require a particular brand name, product, or a feature of a product peculiar to one manufacturer, thereby precluding consideration of a product manufactured by another company
- FAR 11.105 also requires all agencies to prepare justifications when brand name specifications are used in the solicitation.
- Brand Name Justifications
- The Regional Contracting Office is mandated to publicize the justification with the solicitation as well as Request For Quotes (RFQ).

# Sole Source

- ✿ FAR 6.302 explains that supplies or services may be considered to be available from only one source if one of the following examples is met...
  - Unique supplies or services are available from only one or a limited number of sources.
  - A follow-on contract for the continued development/production of a major system or highly specialized equipment (or major components thereof) is needed.
  - Award to any other source would result in substantial duplication of cost to the Government that is not expected to be recovered through competition or unacceptable delays in fulfilling the requirement.
  - The agency's need is for a brand name commercial item.

# Purchase Description

- ➔ **FAR 11** provides guidance for developing your Purchase Request Description.
- ➔ The supplies/services must be described in a manner which will encourage **MAXIMUM COMPETITION** and eliminate any restrictive features which limit acceptable quotes to one contractor's product .
- ➔ The purchase description should contain the **GOVERNMENTS MINIMUM REQUIREMENTS**
- ➔ Form, Fit and Function: What does it do?

# Purchase Description (con't)

- a. **Purchase Description**: is the most common method of describing simplified acquisition requirements. An adequate purchase description should set forth the ***essential physical and functional characteristics*** of the supplies/services required. It should not be unduly restrictive. (i.e. Brand name and P/N only).
- b. Provide the aspect(s) of a product/service that are truly important to you, the END USER.
- c. A restrictive item description could mean the potential for vendors to protest the requirement, which will further delay the procurement process of the award.

# Purchase Description (cont'd)

- Identify your need by defining the who, what, where, when, and why of the requirement
  - Market Research
    - Functions to be performed
    - Performances required
    - Essential characteristics
- Detail the desired scope and requirements, including descriptions, specifications, and other technical information
- Provide criteria for proper evaluation and selection of vendor

# Tips to Speed Procurement

- **PR point of contact**: Include e-mail address, and phone number of supervisor who understands the purchase need.
- **Requirement Description**: Clearly identify what needs to be purchased. Define use in performance specifications
- **Requirement Justification**: Clearly identify *why* this purchase needs to be made, or the mission the purchase will support.

# Tips to Speed Procurement

- **PR Funding**: Allow for extra funds in Government estimates provided to Contracting; the funding will prevent administrative delays associated with requesting additional funds.
- **Excessive Requirements**: Remember, procurement must satisfy the minimum requirements of the Government as identified in the PR.
- **Keep projects separated**. Do not combine requirements into one PR, e.g. plumbers with computer monitors.

# Tips to Speed Procurement

- ▶ Understand your established PR routing (Workflow Chart) and suspense milestones.
- ▶ Do not FIRE and FORGET...once your PR is accepted confirm with Contract Administration Contract Specialist Assigned to make your buy. Call (910) 449-9279.
- ▶ Use the budgeting process to identify large procurements for consolidation, and define requirements with budget submissions

# Commercial Training

- ❖ Up to \$25K: Use of GCPC and SF 182
  - “off-the-shelf” training
- ❖ Greater than \$25K: Requires a contract. Purchase Request to RCO
- ❖ In ALL cases, above steps must be complete *PRIOR* to scheduling any commercial training to avoid *Unauthorized Commitments*

# Purchase Request Priority Codes

- ▶ Contracting interprets priorities, per the Uniform Material Movement, and Issue Priority System (UMMIPS) in accordance with MCO 4400.16G
- ▶ Per the UMMIPS, garrison units are either Force/Activity Designator, F/AD, II or III. Combining the F/AD and the appropriate urgency designator derives the two-digit priority designator you would use on a PR.
- ▶ Priority Codes range from 1 through 15

Remember... poor planning does not constitute an emergency.

# UMMIPS Priority System

Force/Activity Designators		Urgency of Need Designators		
		Unable to Perform Mission	Impaired Operationally	Routine
		A	B	C
<b>I</b>	<b>In Combat</b>	<b>01</b>	<b>04</b>	<b>11</b>
<b>II</b>	<b>Positioned to Deploy for Combat</b>	<b>02</b>	<b>05</b>	<b>12</b>
<b>III</b>	<b>Positioned to Deploy</b>	<b>03</b>	<b>06</b>	<b>13</b>
<b>IV</b>	<b>Other Activity &amp; Select Reserve Forces</b>	<b>07</b>	<b>09</b>	<b>14</b>
<b>V</b>	<b>All Other</b>	<b>08</b>	<b>10</b>	<b>15</b>

# Purchase Request Priority Codes

## Abuse

- ❑ All units across the board are submitting PR's with the highest priority.
- ❑ Units are not properly using priorities.
- ❑ Defeats the purpose of using Priority Codes.

**Creates a backlog** in the buying process because time is wasted when trying to determine what particular purchase is truly urgent and mission essential.

# Urgency Impact Statement

- Must be signed by the Commanding Officer (S-4 Officer, or Supply Officer should have By Direction Authority).
- Must illustrate how the force/activity concerned is *unable to perform its assigned operational missions*, in the event the supplies/services are not procured for immediate end use, or within 15 days.
- Must accompany the Purchase Request, or the purchase will be treated as routine (Priority 12, 13 or 14)

# Contracting Information

- Web site:  
<http://www.mcieast.marines.mil/StaffOffices/Contracting.aspx>
- Status updates available on SharePoint:  
<https://intranet.mcieast.usmc.mil/Contracting/Pages/default.aspx>

# FY 13 Close Out Guidance

**RMKS/I. THIS IS A COORDINATED MCIEAST COMPTROLLER, II MEF COMPTROLLER AND REGIONAL CONTRACTING OFFICE EAST (RCO-EAST) MESSAGE. THE PURPOSE OF THIS MESSAGE IS TO ESTABLISH PROCEDURES FOR PURCHASE REQUESTS (PR) SUBMITTED TO MCIEAST CONTRACTING OFFICES IN ORDER TO PROVIDE MORE EFFECTIVE SUPPORT DURING FY 2013.**

**2. PR SUBMISSION (DEFINED AS ENTERED INTO PR BUILDER) CUT-OFF DATES ARE ESTABLISHED AS FOLLOWS:**

**PROCUREMENT REQUIREMENT CUT-OFF DATE  
GREATER THAN \$1,000,000 05 APR 13  
\$150,000 - \$1,000,000 03 MAY 13 SERVICE CONTRACTS  
\$150,000 - \$1,000,000 12 JUL 13 SUPPLY CONTRACTS  
\$3,000 - \$150,000 16 AUG 13  
<\$3,000 06 SEP 13 AIRCRAFT PARTS  
FY 14 TASK/DELIVERY ORDERS 30 AUG 13**

**MIDNIGHT ON THE DATES LISTED ABOVE, CONSTITUTE THE LAST OPPORTUNITY FOR SUBMISSION AND ACCEPTANCE OF REQUIREMENTS TO BE PROCURED ON THE OPEN MARKET AND DELIVERY ORDERS AGAINST ESTABLISHED GOVERNMENT CONTRACTS. REQUIREMENTS SUBMITTED AFTER THE NOTED CUT-OFF DATES WILL BE ACCEPTED AT THE DISCRETION OF THE DIRECTOR OF THE MCIEAST CONTRACTING OFFICE. 5 DAYS GRACE AFTER A CUTOFF DATE WILL BE ALLOWED FOR A PR TO TRANSIT THE PR BUILDER WORKFLOW AND ARRIVE IN THE CONTRACTS INBOX. ONLY EMERGENT REQUIREMENTS AFFECTING LIFE, LIMB OR MISSION ACCOMPLISHMENT WILL BE CONSIDERED AFTER 16 AUG 2013.**

**3. ALL INTERAGENCY TRANSFER SUPPORT REQUIREMENTS MUST BE SUBMITTED TO MCIEAST RCO BY COB OF THE BELOW LISTED DATES DUE TO ADMINISTRATIVE REVIEW AND PROCESSING TIME REQUIRED. REF A PROVIDES DETAILED OVERVIEW OF FUNDS TRANSFER REQUIREMENTS AND THE RCO WEB SITE PROVIDES REPORT FORMAT AND OTHER GUIDANCE.**

**ECONOMY ACT ORDERS  
ASSISTING ACTIVITY THRESHOLD CUT OFF DATE  
DOD AGENCY \$2,500 TO \$5 MILLION 30 AUG 13  
DOD AGENCY \$5 MILLION OR GREATER 12 JUL 13  
NON DOD AGENCY \$2,500 OR GREATER 12 JUL 13**

**NON ECONOMY ACT ORDERS  
ASSISTING ACTIVITY THRESHOLD CUT OFF DATE  
NON DOD AGENCY \$2,500 TO \$5 MILLION 12 JUL 13  
NON DOD AGENCY \$5 MILLION OR GREATER 14 JUN 13**

**4. SUPPORTED UNITS WILL SCREEN MANDATORY FEDERAL SOURCES OF SUPPLY PRIOR TO SUBMITTING REQUIREMENTS TO MCIEAST RCO. THOSE REQUIREMENTS NOT AVAILABLE FROM MANDATORY SOURCES WILL BE SUBMITTED TO MCIEAST RCO UTILIZING PR BUILDER. PR SUBMISSION MUST INCLUDE TECHNICAL POC INFORMATION, A DETAILED DESCRIPTION OF THE REQUIREMENT, REASONABLE REQUIRED DELIVERY DATE, AND A VALID LINE OF ACCOUNTING. JUSTIFICATION STATEMENTS MUST BE SUBMITTED BY REQUIREMENT GENERATORS FOR ALL LIMITED/SOLE SOURCE AND URGENT REQUIREMENTS TO SUBSTANTIATE LIMITING COMPETITION. ADDITIONAL GUIDANCE FOR JUSTIFICATION STATEMENTS IS PROVIDED ON THE RCO WEBSITE.**

# Point of Contacts

- **Director of Contracting**
  - **Sherry Gaylor (451-7842)**
- **Senior Enlisted Advisor**
  - **MGySgt Boyd (451-5182)**
- **Procurement Chief**
  - **MSgt DeLeon (449-9278)**
- **T&R Customer Service/Training**
  - **SSgt Coleman (450-9279)**
- **PRBuilder POC**
  - **Renee Ridenour (451-5520)**

“You don’t plan to fail, You fail to plan”.

**QUESTIONS?**