

REQUESTOR PROCEDURES
FOR PROCUREMENT /PROPERTY SERVICES

STEP 1. Required Sources (Step 1 required to be completed prior to proceeding to Step 2)

Email the Location Property Management Officer (LPMO) Julie Grogan at Julie.Grogan@ars.usda.gov with Equipment/Item description to determine whether suitable excess property is available from the following list below.

****Note-Julie's email response is required to be included with this completed packet.**

- Agency Inventory
- Excess from other agencies
- Provide statement from LPMO if requisition generated (See Attachment 1)
- Enclose Excess Property Certification (Attachment 1)

STEP 2. Prepare a Requisition Request (AD-700) Complete AD-700 like normal except in blocks listed below enter the following information.

- Block 10 – TBD
- Block 15 – 3121 – Ag Equipment or 3122 Lab Equipment

STEP 3. Information and Specifications as follows:

(End User works with and provides the following to the Location Purchasing Agent)

Note: All requests exceeding \$25,000 must have synopsis in FedBizOpps.Gov (FBO). This list assists in the preparation of the specifications and synopsis.

Documentation listed below must be completed as shown on **Sample Attachment 2** (Enclosed in this package). *Document needs to be completed in MS Word using Times New Roman 12 Pt Font.* Email your purchasing agent with attachment. *All boxes below need to be checked and answered completely.*

- Define minimum requirements
- Include in specification a statement how equipment or item will be used in the research project.
- Is this a Brand Name ONLY or can item be Equivalent? **Brand_____ or Equivalent_____**
- Provide Salient Characteristics and/or Line Item Descriptions
- Is Descriptive Literature needed to determine if product will meet your needs? **Yes_____ No_____**
- Is Training needed? **Yes_____ No_____**
- Is Installation required? **Yes_____ No_____**
- Is the Commercial Warranty sufficient to meet your needs? **Yes_____ No_____**

- What is the required Delivery Date/Time? _____
- Include Excess Property Certificate from Step 1.

STEP 4. Evaluation Factors will be used when evaluating Proposals: *Check all boxes that apply.*

- Technical (Evaluate)
- Descriptive Literature
- Warranty
- Training
- Installation
- Delivery
- Past Performance
- Price
- Other, Options

STEP 5. List Sources:

Attach the list of sources – These are the vendor’s that you already contacted. Include name of vendor, contact person, email address and phone number. This must be included in your paperwork so the purchasing agent can notify vendor of the FBO Solicitation.

STEP 6. Certification: Please digitally sign documents.

Technical Certification:

I certify that the supporting data under my cognizance which are included in the justification are accurate and complete to the best of my knowledge and belief.

Scientist or Research Leader’s Signature and Title

Contracting Officer Concurrence:

I certify that the facts and representations under my cognizance which are included in this justification are accurate and complete to the best of my knowledge and belief.

Contracting Officer’s Signature

(Sole Source) Justification for Other than Full and Open Competition – DO NOT COMPLETE THIS FORM IF YOUR PURCHASE IS NOT FOR A SOLE SOURCE VENDOR.

Attached is the Sole Source Justification Form. This form needs be completed when “ONLY” one vendor sells the item or equipment. Once this form has been completed and returned to the Purchasing Agent it will be forwarded to Headquarter’s for review and approval. **STEPS 1-4** are still required to be completed even if you are completing the Sole Source Justification form.

***Note: The purchase cannot go forward without approval from Headquarter’s for the Sole Source Justification.

Contact your purchasing agent if you have any questions.