



George C. Marshall Space Flight Center  
Marshall Space Flight Center, Alabama 35812

FPD-OI-FD40.11  
March 12, 2004

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# ORGANIZATIONAL INSTRUCTION

## Flight Projects Directorate Ground Systems Department FD40

# Ground Systems Department Purchase Planning

## Revision B

### APPROVAL

<u>NAME</u>	<u>TITLE</u>	<u>ORG</u>	<u>DATE</u>
<u>Original Signed by</u>	Manager, Ground Systems Department	FD40	March 12, 2004
_____			
Ann R. McNair			

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### DOCUMENT HISTORY LOG

<b>Status (Baseline/ Revision/ Canceled)</b>	<b>Document Revision</b>	<b>Effective Date</b>	<b>Description</b>
Baseline		9/14/99	Baseline version
Revision	Rev. A	3/14/01	Document reformatted to Flight Projects Directorate standard template.
Revision	Rev. B	3/12/04	Updated Section 4.3, Document Plan and deleted IDIQ and NASA purchase references since these are no longer done. Sections 4.6, 4.7, and 4.8 were combined and cover contractor procurements only. Updated the flow chart in Section 11. Updated title and section references for MWI 5100.1.

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### **4.3 Procurement Plan**

The contractor creates a detailed procurement plan and submits it to the Business Management Office for review. This plan includes a brief description of the item to be purchased, need date (i.e., date when item must be available for installation), actionee (i.e., technical expert to write procurement specification or provide vendor and part number information), and estimated cost. All plans shall be provided electronically and submitted in tabular column format, compatible with Microsoft Excel.

### **4.4 Procurement Plan Review**

The Business Management Office reviews the contractor's procurement plan.

### **4.5 Procurement Plan Approval**

The Business Management Office determines if the contractor's procurement plan is approved.

- 4.5.1 If the procurement plan is not approved then the contractor makes adjustments to the plan. The plan is then re-reviewed by the Business Management Office and a determination is made on approval of the procurement plan.

### **4.6 Generation and Execution of Purchase Requisitions**

The procurement plan is approved and the contractor proceeds to generate purchase requisitions for the procurement items and to execute the procurement using its own procurement system and personnel. The contractor shall provide or implement and maintain a MSFC online procurement system, which is integrated with the contractor's procurement system, to provide on-line funding verification of purchase orders and contracts. This system shall be a Filemaker Pro Database.

## **5. NOTES**

None

## **6. SAFETY PRECAUTIONS AND WARNING NOTES**

None

## **7. APPENDICES, DATA, REPORTS, AND FORMS**

None

## **8. QUALITY RECORDS**

The Quality Records for this Organizational Instruction are listed in the following table.

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<b>Number/ Name</b>	<b>Collection</b>	<b>Indexing</b>	<b>Access</b>	<b>Maintenance</b>	<b>Retention</b>	<b>Disposition</b>
Procurement Plan	Contractor submits for approval	5100, By FY	Business Management Office	Annual retention/purge review	3 years	Discard or Recycle
Procurement Request	Contractor generates	5100, By FY	Business Management Office	Annual retention/purge review	3 years	Discard or Recycle
COTR Training Memorandum	Memo listing employee & training date	3400, By Employee		Annual retention/purge review	Until updated	Discard or Recycle

## **9. TOOLS, EQUIPMENT, AND MATERIALS**

None

## **10. PERSONNEL TRAINING AND CERTIFICATION**

MWI 5100.1, paragraph 3.3.2 requires that all personnel acting as a Contracting Officer's Technical Representative (COTR) be trained and certified prior to acting in this capacity.

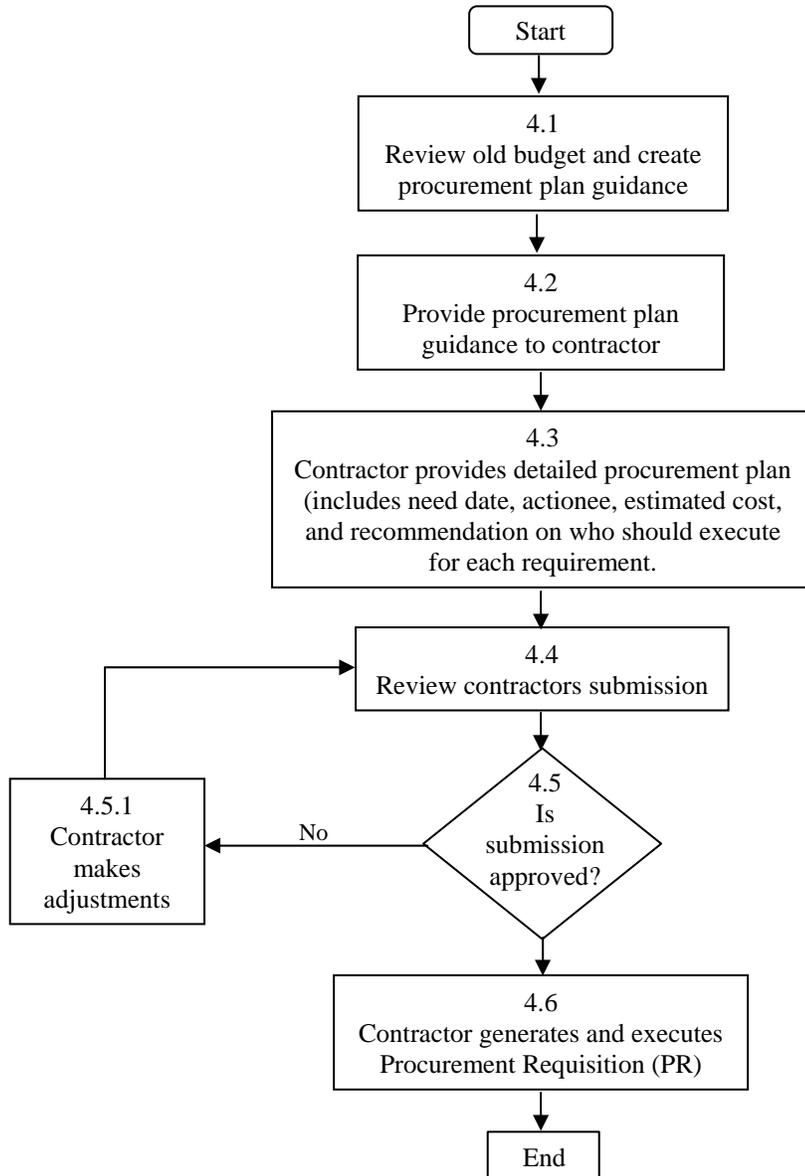
## **11. FLOW DIAGRAM**

Figure 1 graphically depicts the procedure stated in Section 4.0 of this document.

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**FIGURE 1: Ground Systems Department Purchase Planning Process**



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