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STANDARD OPERATING PROCEDURE

DIVISION/SECTION: ADMINISTRATION DIVISION		
NUMBER: 004-FY2017	DATE OF ISSUE: July 6, 2017 (Modified: 10/09/17)	EFFECTIVE DATE: IMMEDIATELY
SUBJECT: Office/Purchase Requisition(s)		

Policy: It shall be the policy of the Public Defender Service Corporation to set up policies and procedures for the procurement of goods and/or services for the Corporation.

Purpose: To ensure that standards and procedures are followed for preparing requisitions for processing by the Fiscal Division of the Public Defender Service Corporation and that all necessary documents are included with the requisition to ensure the continued efficiency and fiscal accountability is adhered to at all times.

Scope: This SOP will ensure that all divisions of the PDSC adhere to sound competitive purchasing procedures. The procurement planning is essential for the effective and timely solicitation of quotes, proposals, award of contracts and delivery of the goods and services required for the operations of the Corporation. Division heads are responsible for developing their procurement plans in cooperation with Fiscal to ensure adequate time for delivery of goods and/or services for their respective divisions.

Responsibilities: It is the responsibility of all Division Heads/Supervisors to ensure that this SOP is followed so that operations within their section is not compromised or hampered in any way relative to purchases.

Procedure: Under the direction of the Assigned Supervisor within each of the divisions:

All requests for procuring supplies, equipment and services shall be submitted to Fiscal with a requisition. The requisitions shall include the following information:

1. **REQUESTING DIVISION:** Name of Division and Supervisor submitting request
2. **NAME OF PERSON RESPONSIBLE FOR RECEIVING ITEMS:** Identify the person within your division that can receive your item(s)
3. **DELIVERY DATE REQUESTING:** The date of delivery may vary depending on items requested; however, if the items are needed due to an emergency, please provide details, to include 'ideal delivery date' in the "NOTES/REMARKS" box.
4. **QTY:** Number of items requested, per entry.
5. **UNITS #:** Please indicate "pieces, boxes, dozen or other type of unit of measurement for the item requested."
6. **DESCRIPTION:** This section is crucial to acquiring the correct item requested for. i.e. - "re-order number" for a particular brand; color, size, item number/s.k.u. number and description. Additionally, it is important that a clear, concise statement of what is required is provided in the description. With the exception of Xerox paper and/or products for the Xerox machine, the specifications should be generic in nature, in order to facilitate fair competition for the goods and services being acquired. Specifications shall not specify brand names, products of

one company or features which are particular to the products of one company, unless it has been determined in writing by the requisitioner that these particular products or those particular features are essential to the PDSC's requirements, and that products of another company would not meet the requirements. Where proprietary items are specified or standardization is evoked, the requisitioner must provide justifications in writing to the Administrative Director for approval before the procurement action is initiated. On occasion, brand name could be stated to clarify requirements, however adding "or similar equipment" or "equivalent" is compulsory.

7. **UNIT PRICE:** Enter amount from vendor-acknowledged purchase order, if available, or quotation from vendor, otherwise, leave blank. You may use historical data or estimated amounts if available.
8. **LINE TOTAL:** Amount derived from QTY x Unit Price.
9. **NOTES/REMARKS:** Write in any and all information relative to your request that you deem Management should be informed of including item No. 3 above.
10. **TOTAL:** Sum of all amounts in Line Total
11. **SIGNATURE OF SUPERVISOR and DATE:** Self Explanatory.
12. **CERTIFIED FUNDS AVAILABLE:** (To be signed by Certifying Officer) Leave Blank.
13. **SIGNATURE OF AUTHORIZING AUTHORITY and DATE:** Self Explanatory.
14. **RECEIVED BY FISCAL OFFICE:** Leave Blank.
15. **REQUESTED ITEM RECEIVED BY and DATE:** After receipt of items requested: Sign and date by person authorized to receive the requested item.
16. **DELIVERY / PICK-UP:** There may be times where the vendor will not deliver requested items that are below a required purchase amount. Should delivery not be available, the requisitioner may need to arrange for pick-up of such items requested – once available by vendor.

It should be noted that Fiscal will not process any requisition without proper certification of funding. Each supervisor or his/her designee is required to indicate the balance of his/her division's budget prior to signing the request. The Chief Fiscal Officer (CFO) and/or Administrative Director are designated to certify available budget funding. CFO or his/her designee is also responsible for maintaining detailed records of all obligations and expenditures against the accounts for which they have been delegated the responsibility. It is the responsibility of the CFO not to exceed the budget lines under his/her authority without prior authorization.

(end)