















































Inter-American Institute for  
Cooperation on Agriculture

Process Manual 12 Management of Contracting and Services

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## Macroprocess

### 12 Management of Contracting and Services

#### Objective

Guarantee adequate availability of goods and services and optimal preservation of infrastructure, on the basis of efficiency and adequate expenditure management.

#### Scope

Hemispheric level.  
Technical-regulatory actions at the hemispheric level.  
Centralization at strategic levels and at Headquarters.  
Partial decentralization at the tactical and operational levels by region and country.

#### Inputs

Request for the procurement of goods and services.  
Request for the provision of non-IT services.  
Inflow of assets and supplies.

#### Processes

12.1 Purchases and Procurement

12.2 Management of Assets and Supplies..

12.3 Maintenance and Safekeeping of Infrastructure and Non-Computer Equipment.

12.4 Management of Internal Services.

#### Outcomes

Movable and immovable property as well as services procured in a timely fashion and in accordance with requirements.

Expenses optimized based on established goals.

Facilities and assets maintained and protected in an effective manner.

Internal services offered to the full satisfaction of internal clients.

**Process**

**12.1 Purchase and Procurement.**

<b>Objective</b>	Guarantee the availability of goods and services required by IICA, on the basis of efficiency and adequate expenditure management.
<b>Scope</b>	Hemispheric level. Technical-regulatory actions at the hemispheric level. Centralization at strategic levels and at Headquarters. Partial decentralization at the tactical and operational levels by region and country.
<b>Specific policies and rules</b>	<ol style="list-style-type: none"> <li>1. All entity that request the procurement of a good or service, must receive authorization from its Supervisor and have the necessary budgetary resources to justify the purchase.</li> <li>2. The minimum supporting information and documentation that the requesting unit must submit in order to procure the good or service will depend on the method utilized, as set out in the regulatory framework of the Procedures Manual for the Procurement of Goods and Services.</li> <li>3. The Corporate Purchasing Committee must include representatives of all units that may be able to contribute to a bidding process, including the requesting unit.</li> <li>4. At Headquarters, the definition, formalization and control of contracts for the procurement of goods or services will be the responsibility of the Administrative Services Division with support from the Legal Unit and the requesting units, as necessary. In the IICA Delegations in the member countries, this will be the responsibility of the corresponding Administration</li> <li>5. The filing of supporting documentation for purchase and contracting processes will be the responsibility of the Administrative Services Division at Headquarters and of the corresponding Administration in the IICA Delegations in the member countries.</li> </ol>
<b>Information Systems</b>	SIG - SAP - FONT – Office – Travel System – Email.
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• Percentage of purchases made versus those that were programmed.</li> <li>• Percentage of requests addressed on time versus the number of requests received.</li> <li>• Satisfaction surveys with excellent results (90% to 100%).</li> </ul>

<b>Process</b>	<b>Subprocess</b>
12.1 Purchase and Procurement	12.1.1 Annual Plan for Purchases and Procurement
	12.1.2 Registry and maintenance of suppliers.
	12.1.3 Identification of the Purchase Method.
	12.1.4 Purchases by Credit Card or from Petty Cash.
	12.1.5 Direct Contracting.
	12.1.6 Contracting by a competitive method for the purchase of goods and/or services..
	12.1.7 Contracting by bidding.
	12.1.8 Hiring of consultants.
	12.1.9 Formalization of the contracting and delivery of the goods or implementation of the service acquired.
	12.1.10 Travel management (planned travel).
	12.1.11 Travel management (unplanned travel)
	12.1.12 Management for negotiation or renewal insurances.

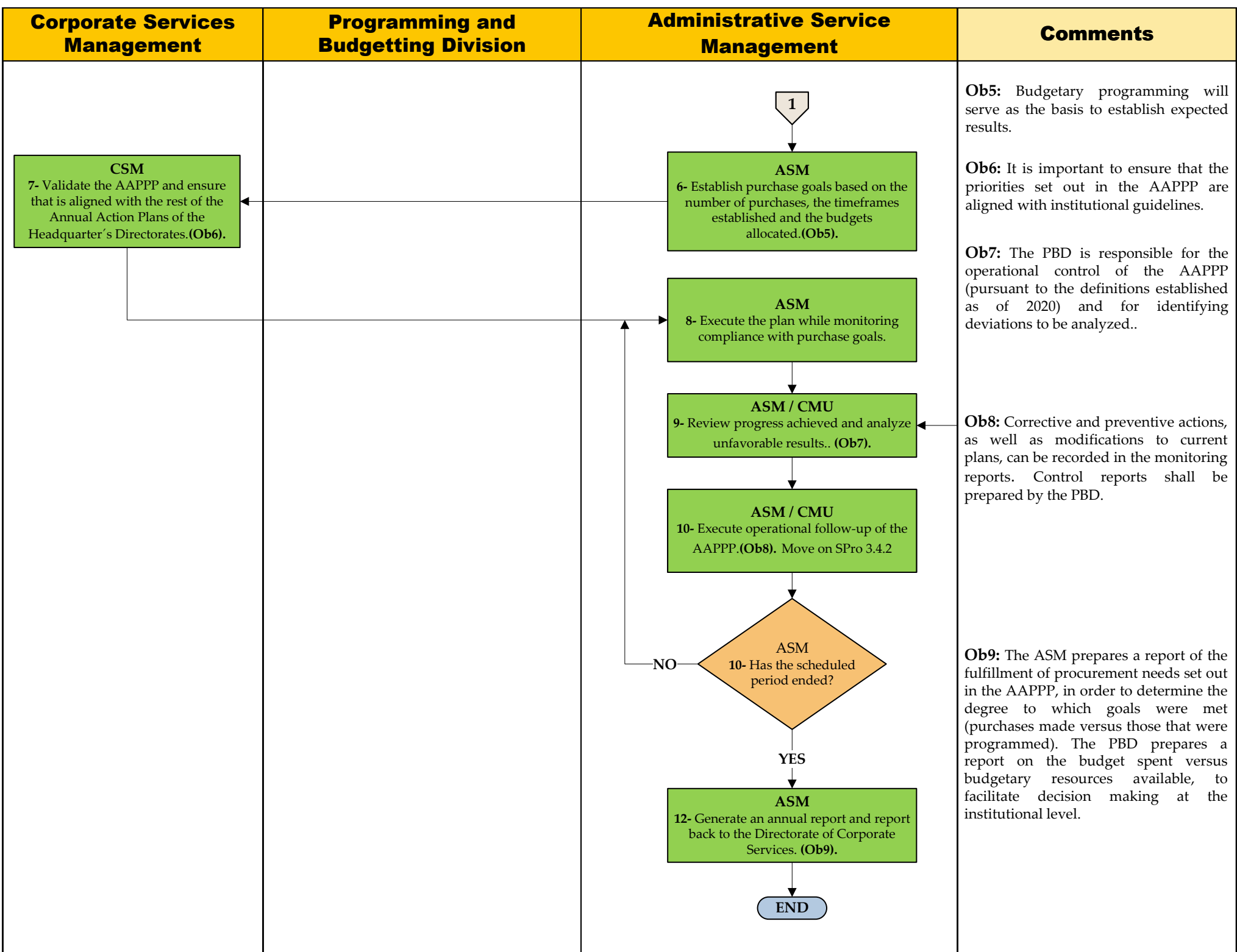
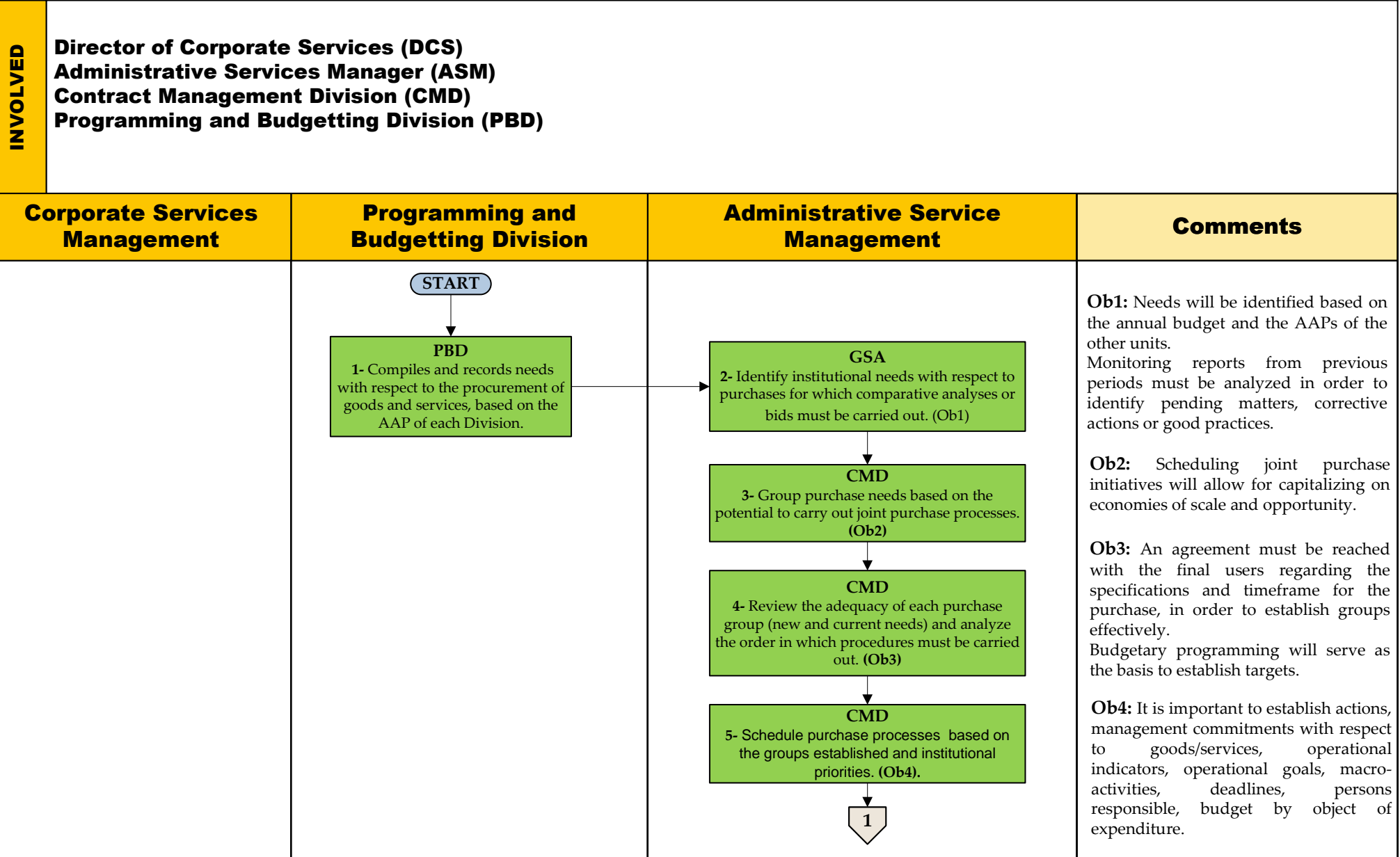
## Subprocess

### 12.1.1 Annual Plan for Purchases and Procurement.

<b>Objective</b>	Establish annual goals with respect to purchases and procurement, which would allow for taking advantage of economies of scale and establishing an institutional flow of purchases and procurement on a scheduled basis and according to the needs.	
<b>Inputs</b>	<b>Background information</b>	<b>Reference Material</b>
	Annual Plan for Purchases and Procurement in effect.	<ul style="list-style-type: none"> <li>• Budget Plan.</li> <li>• Monitoring reports.</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Updated Annual Plan for Purchases and Procurement. Analysis of compliance with goals related to purchases. Optimization of expenditures, based on the goals established.	

**12.1 Purchase and Procurement.**

**12.1.1 Annual Plan for Purchases and Procurement.**



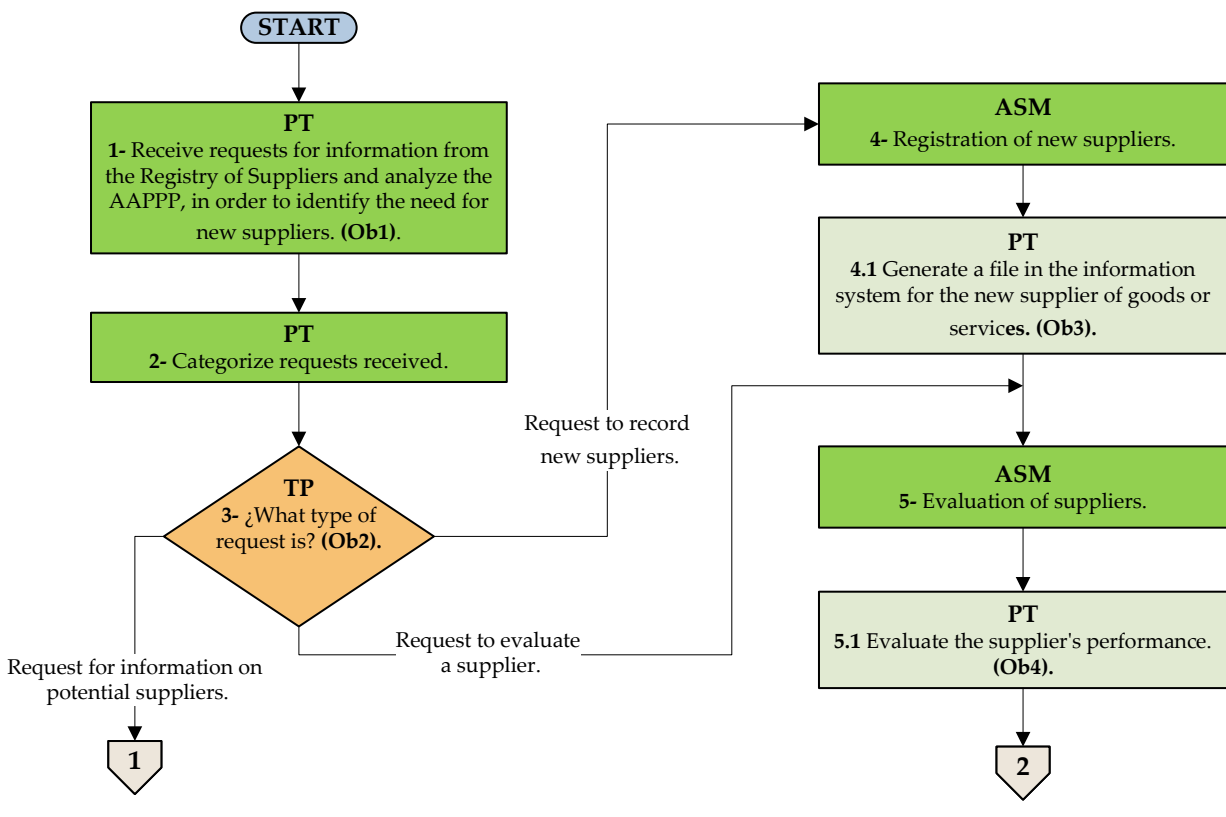
## Subprocess

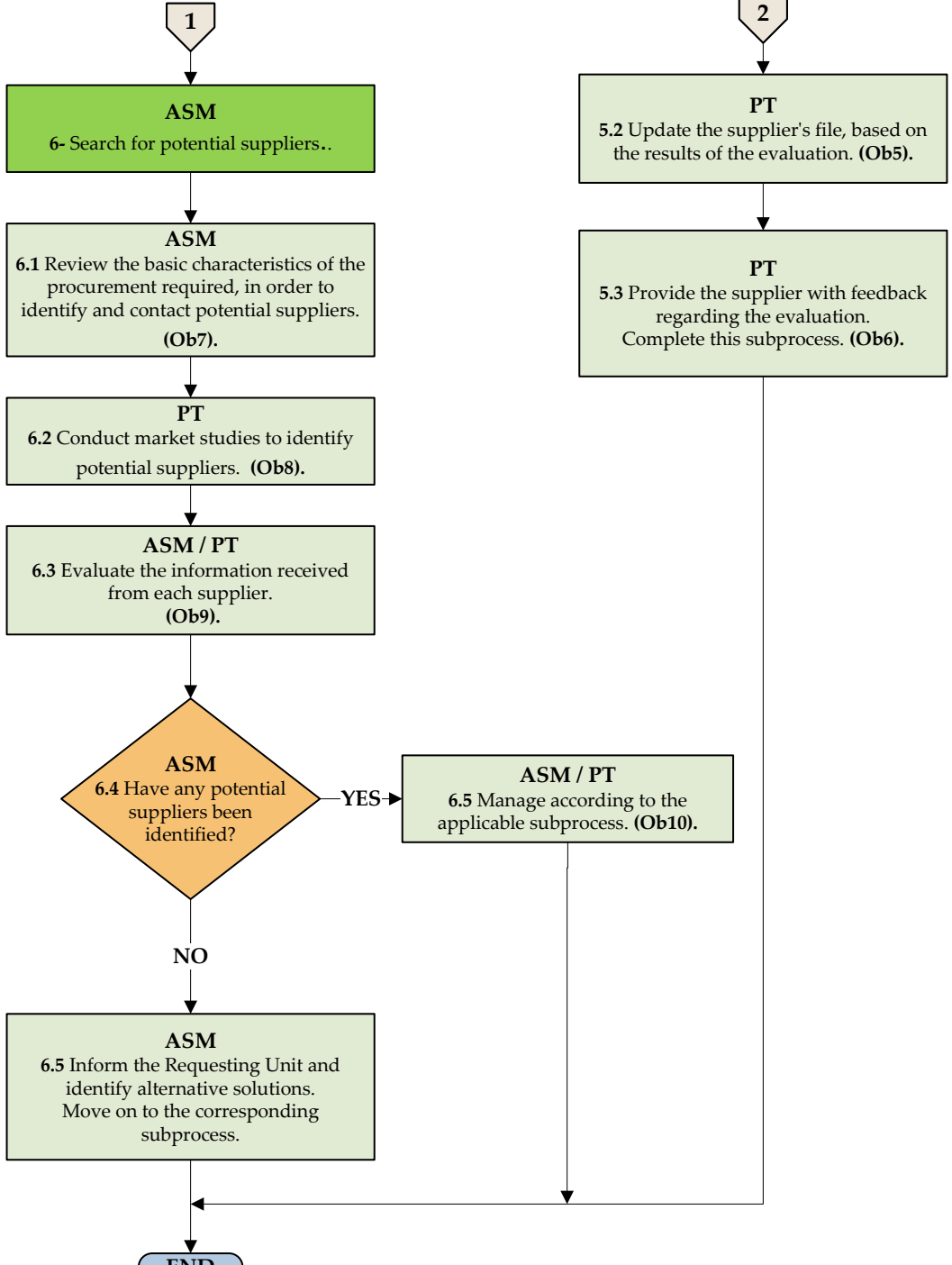
### 12.1.2 Registry and maintenance of suppliers.

<b>Objective</b>	Ensure that the Administrative Services Division monitors the behavior of its regular suppliers and is aware of potential suppliers of high-quality goods and services.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Need for new suppliers.</li> <li>• Suppliers that are completing the provision of a good or service.</li> </ul>	<ul style="list-style-type: none"> <li>• Current Purchase Annual Plan.</li> <li>• Manual for the Procurement of Goods and Services</li> <li>• Internal regulations.</li> <li>• Material defined by the process support systems.</li> </ul>
<b>Products</b>	Record of suppliers that have been evaluated and categorized based on their area of expertise and an evaluation of their interaction with the Institute.	

## 12.1 Purchases and Procurement

### 12.1.2 Registry and maintenance of suppliers.

<b>INVOLVED</b>	<p><b>Administrative Services Manager (ASM)</b> <b>Procurement Technician (PT)</b> <b>Requesting Unit (RU)</b></p>
Administrative Services Management	Comments
 <pre> graph TD     START([START]) --&gt; PT1[PT 1- Receive requests for information from the Registry of Suppliers and analyze the AAPPP, in order to identify the need for new suppliers. (Ob1).]     PT1 --&gt; PT2[PT 2- Categorize requests received.]     PT2 --&gt; TP{TP 3- ¿What type of request is? (Ob2).}     TP -- "Request to record new suppliers." --&gt; ASM4[ASM 4- Registration of new suppliers.]     TP -- "Request to evaluate a supplier." --&gt; ASM5[ASM 5- Evaluation of suppliers.]     TP -- "Request for information on potential suppliers." --&gt; 1{1}     ASM4 --&gt; PT41[PT 4.1 Generate a file in the information system for the new supplier of goods or services. (Ob3).]     PT41 --&gt; ASM5     ASM5 --&gt; PT51[PT 5.1 Evaluate the supplier's performance. (Ob4).]     PT51 --&gt; 2{2}             </pre>	<p><b>Ob1:</b> Requests may be related to the registration of new suppliers or the search for potential suppliers.</p> <p><b>Ob2:</b> Successful bidders who agree to deliver their services within the framework of a Purchase Order or Contract must be added to the registry and evaluated. For activities 1, 2 and 3, suppliers will be asked to register as suppliers of goods and services or update their information on the Institute's website (www.iica.int). Activity 2 applies for current suppliers.</p> <p><b>Ob3:</b> All registered suppliers must be categorized by their area of expertise or the type of service they provide (consultancy services, sale of vehicles, audio service, etc.). New suppliers will be asked to provide:              - Supplier registration form (+ personal data protection + registration with the Ministry of Finance)              - Bank certification in the case of national suppliers              - Legal identification number              The documentation provided by the supplier is filed in an electronic folder.</p> <p><b>Ob4:</b> This evaluation must be carried out once the good or service has been delivered in its entirety. If it is a long-term contract, intermediate monitoring evaluations may be carried out. The evaluation will be carried out by the ASM and the requesting unit. The quality of the good or service delivered, compliance with the agreements, customer service (during and after the delivery of the good or service, as applicable) will be evaluated.</p>

Administrative Services Management	Comments
 <pre> graph TD     1{1} --&gt; ASM6[ASM 6- Search for potential suppliers..]     ASM6 --&gt; ASM61[ASM 6.1 Review the basic characteristics of the procurement required, in order to identify and contact potential suppliers. (Ob7).]     ASM61 --&gt; PT62[PT 6.2 Conduct market studies to identify potential suppliers. (Ob8).]     PT62 --&gt; ASMPT63[ASM / PT 6.3 Evaluate the information received from each supplier. (Ob9).]     ASMPT63 --&gt; ASM64{ASM 6.4 Have any potential suppliers been identified?}     ASM64 -- YES --&gt; ASMPT65[ASM / PT 6.5 Manage according to the applicable subprocess. (Ob10).]     ASM64 -- NO --&gt; ASM65[ASM 6.5 Inform the Requesting Unit and identify alternative solutions. Move on to the corresponding subprocess.]     ASMPT65 --&gt; END([END])     2{2} --&gt; PT52[PT 5.2 Update the supplier's file, based on the results of the evaluation. (Ob5).]     PT52 --&gt; PT53[PT 5.3 Provide the supplier with feedback regarding the evaluation. Complete this subprocess. (Ob6).]     PT53 --&gt; END             </pre>	<p><b>Ob5:</b> The result will be categorized as: "eligible", "under evaluation", or "deficient".</p> <p><b>Ob6:</b> A supplier that is "under evaluation" or "deficient" can be re-classified as "eligible" by making improvements to the full satisfaction of the evaluators.</p> <p><b>Ob7:</b> Additional suppliers may be requested if there are technical specifications that cannot be met by the registered suppliers, or if there are not enough suppliers to meet those specifications.</p> <p><b>Ob8:</b> Request information regarding the legal status of the supplier as well as its products and services, in addition to verifiable references from clients.</p> <p><b>Ob9:</b> The information collected will be entered into a database, for use as part of any purchasing subprocesses.</p> <p><b>Ob10:</b> Move on to subprocess 12.1.3 or subprocess 12.1.4.</p>



## Subprocess

### 12.1.3 Identification of the Purchase Method.

<b>Objective</b>	Guarantee the adequate availability of goods and services, on the basis of efficiency in procurement and adequate expenditure management.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Purchase requisitions submitted via the information system.</li> <li>• Requests for purchases and/or procurement in the amount of USD 50,000 or more submitted via email, for which a bidding process is required.</li> <li>• Formats for contracts.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Purchase Plan.</li> <li>• Annual Action Plan (AAP).</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Financial Rules.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Movable and immovable property as well as services procured in a timely manner and in accordance with the requirements indicated. Expenditures optimized, based on the established goals.	

## 12.1 Purchases and Procurement.

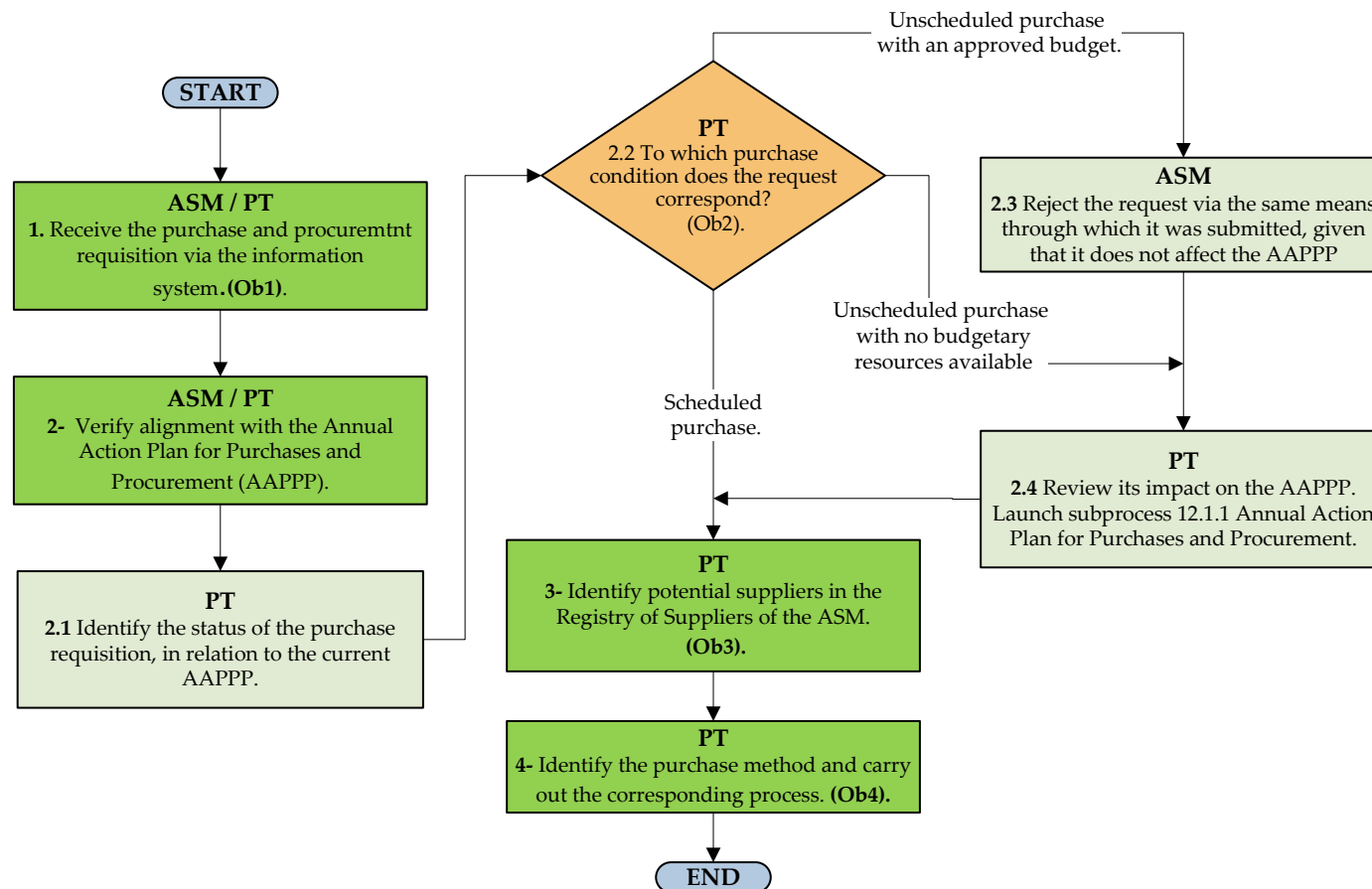
### 12.1.3 Identification of the Purchase Method.

INVOLVED

**Administrative Services Manager (ASM)**  
**Procurement Technician (PT)**  
**Warehouse Clerk (WC)**  
**Requesting Unit (RU)**  
**Corporate Purchasing Committee (CPC)**

#### Administrative Services Management

#### Comments



**Ob1:** The requisition must indicate the budget available for the purchase and a technical justification for the need that exists.

**Ob2:** It is important to identify the impact in terms of time, as well as notify any users involved.

**Ob3:** The Requesting Unit may recommend suppliers that have not been added to the registry by the ASM. Potential suppliers identified by the ASM will be added to the Registry. If necessary, launch process 12.1.2 Registry of Suppliers to search for potential suppliers.

**Ob4:** This is determined based on the budgeted amount:

- Up to USD 2,000 or the equivalent amount in the local currency: direct purchase or procurement (including consultancy services).

- USD 2,000 to 50,000 or the equivalent amount in the local currency: purchase or procurement via a comparative process: at least 3 quotes/offers (including consultancy services).

- More than USD 50,000 or the equivalent amount in the local currency: purchase or procurement via an institutional bidding process (including consultancy services).



**Subprocess**

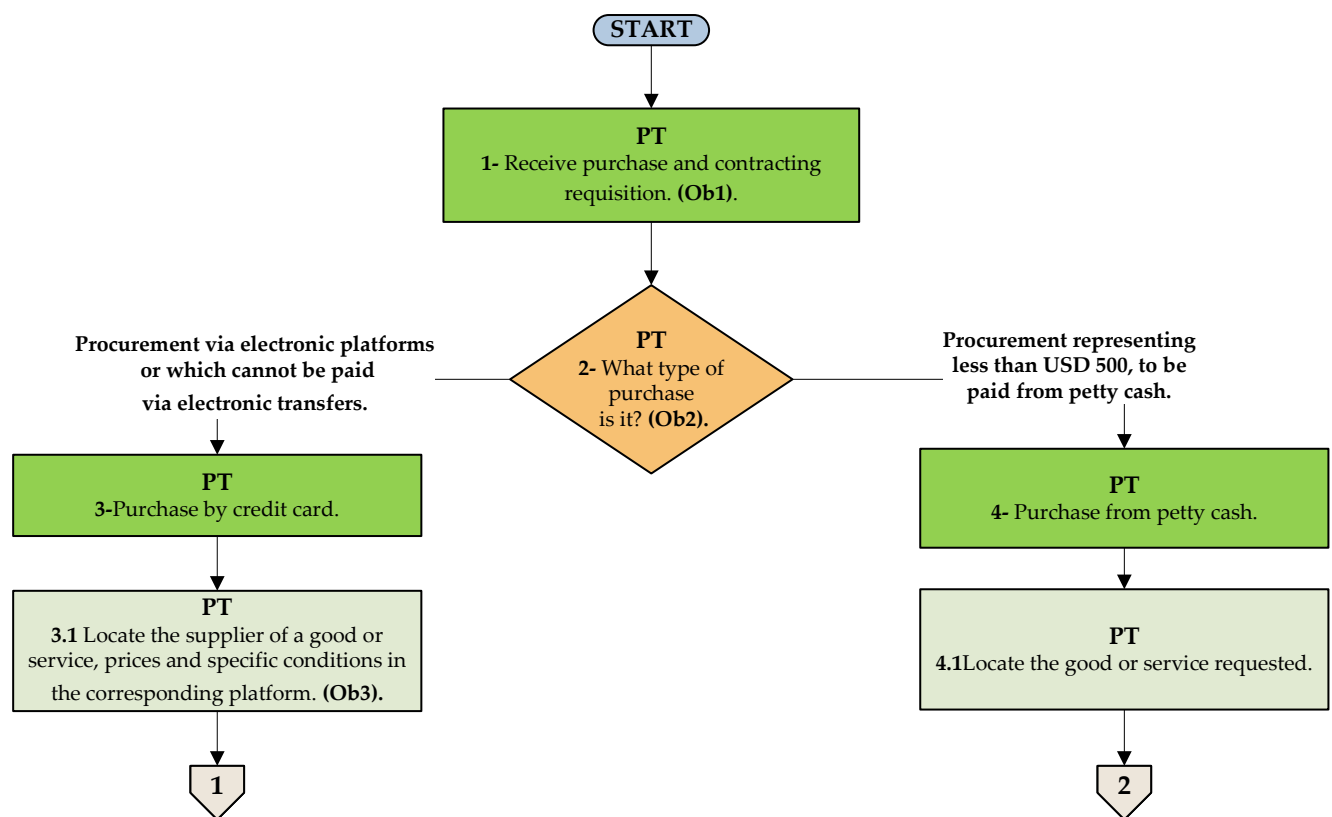
**12.1.4 Purchases by Credit Card or from Petty Cash.**

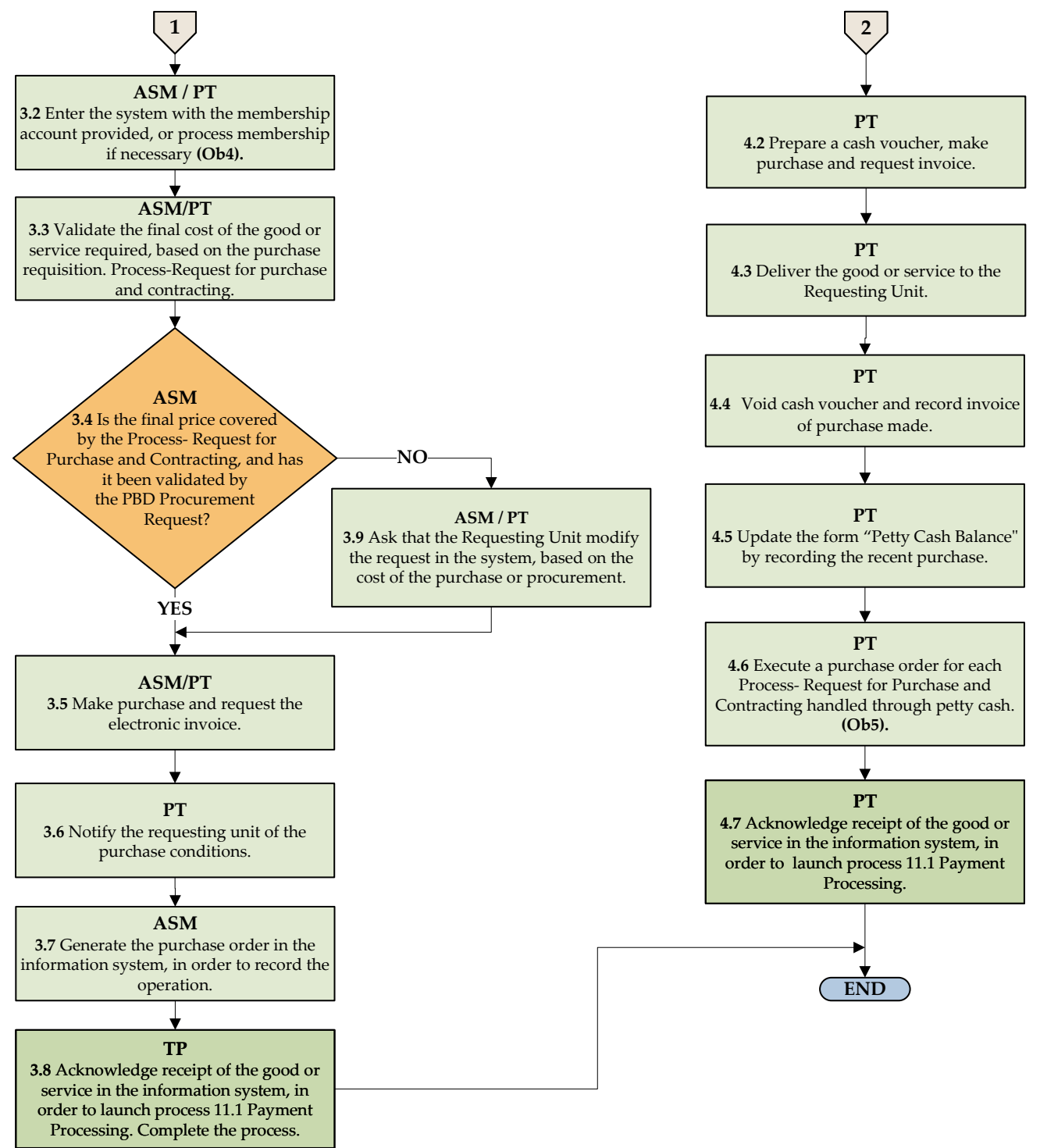
<b>Objective</b>	Facilitate the expeditious procurement of products or services which cannot be procured via electronic payments.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	Purchase requisitions and contracting submitted via the system.	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Annual Action Plan (AAP).</li> <li>• Financial Rules.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Goods or services acquired in an expeditious manner.	

**12.1 Purchases and Procurement.**

**12.1.4 Purchases by Credit Card or from Petty Cash.**

<b>INVOLVED</b>	<p><b>Administrative Services Manager (ASM)</b> <b>Procurement Technician (PT)</b> <b>Requesting Unit (RU)</b></p>
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Administrative Services Management	Comments
 <pre> graph TD     START([START]) --&gt; PT1[PT 1- Receive purchase and contracting requisition. (Ob1).]     PT1 --&gt; PT2{PT 2- What type of purchase is it? (Ob2).}     PT2 -- "Procurement via electronic platforms or which cannot be paid via electronic transfers." --&gt; PT3[PT 3-Purchase by credit card.]     PT2 -- "Procurement representing less than USD 500, to be paid from petty cash." --&gt; PT4[PT 4- Purchase from petty cash.]     PT3 --&gt; PT3_1[PT 3.1 Locate the supplier of a good or service, prices and specific conditions in the corresponding platform. (Ob3).]     PT3_1 --&gt; 1{{1}}     PT4 --&gt; PT4_1[PT 4.1 Locate the good or service requested.]     PT4_1 --&gt; 2{{2}}                     </pre>	<p><b>Ob1:</b> Categorized accordingly in the IT system: i) Corporate Credit Card - Purchases or Contracting; ii) Petty Cash Purchases</p> <p><b>Ob2:</b> The request must include the estimated cost and estimated budget for the purchase. In the case of electronic purchases (by credit card), it is also necessary to indicate the location of the supplier of the good or service (link), as well as the affiliate accounts if they are necessary. If payment via credit card or petty cash is not applicable, go to <b>process 12.1</b> where the request category should be updated, or the requesting unit may be asked to cancel and resubmit the request, as appropriate; this will depend on the type of supplier (individual or legal entity).</p> <p><b>Ob3:</b> If more than one supplier is identified, the information is collected and validated together with the requesting unit, to select the most appropriate supplier.</p>

Administrative Services Management	Comments
 <pre> graph TD     1{{1}} --&gt; ASM_PT_3_2[ASM / PT 3.2 Enter the system with the membership account provided, or process membership if necessary (Ob4).]     ASM_PT_3_2 --&gt; ASM_PT_3_3[ASM/PT 3.3 Validate the final cost of the good or service required, based on the purchase requisition. Process-Request for purchase and contracting.]     ASM_PT_3_3 --&gt; ASM_3_4{ASM 3.4 Is the final price covered by the Process- Request for Purchase and Contracting, and has it been validated by the PBD Procurement Request?}     ASM_3_4 -- NO --&gt; ASM_PT_3_9[ASM / PT 3.9 Ask that the Requesting Unit modify the request in the system, based on the cost of the purchase or procurement.]     ASM_PT_3_9 --&gt; ASM_PT_3_4     ASM_3_4 -- YES --&gt; ASM_PT_3_5[ASM/PT 3.5 Make purchase and request the electronic invoice.]     ASM_PT_3_5 --&gt; PT_3_6[PT 3.6 Notify the requesting unit of the purchase conditions.]     PT_3_6 --&gt; ASM_3_7[ASM 3.7 Generate the purchase order in the information system, in order to record the operation.]     ASM_3_7 --&gt; TP_3_8[TP 3.8 Acknowledge receipt of the good or service in the information system, in order to launch process 11.1 Payment Processing. Complete the process.]     TP_3_8 --&gt; END([END])          2{{2}} --&gt; PT_4_2[PT 4.2 Prepare a cash voucher, make purchase and request invoice.]     PT_4_2 --&gt; PT_4_3[PT 4.3 Deliver the good or service to the Requesting Unit.]     PT_4_3 --&gt; PT_4_4[PT 4.4 Void cash voucher and record invoice of purchase made.]     PT_4_4 --&gt; PT_4_5[PT 4.5 Update the form "Petty Cash Balance" by recording the recent purchase.]     PT_4_5 --&gt; PT_4_6[PT 4.6 Execute a purchase order for each Process- Request for Purchase and Contracting handled through petty cash. (Ob5).]     PT_4_6 --&gt; PT_4_7[PT 4.7 Acknowledge receipt of the good or service in the information system, in order to launch process 11.1 Payment Processing.]     PT_4_7 --&gt; END                     </pre>	<p><b>Ob4:</b> The Officer may provide support in this process, with authorization from the ASM.</p> <p><b>Ob5:</b> The purchase order will take into account the petty cash purchase made. The purpose of this activity is to enable the Accounting Management Division to keep an financial record of petty cash purchases and to replenish the petty cash fund.</p>

## Subprocess

### 12.1.5 Direct Contracting.

<b>Objective</b>	Guarantee the adequate availability of goods and services, on the basis of efficiency in procurement and adequate expenditure management.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Purchase and contracting requisition submitted via the information system.</li> <li>• Formats for contracts.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Purchase Plan.</li> <li>• Annual Action Plan (AAP).</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Financial Rules.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Movable and immovable property as well as services procured in a timely manner and in accordance with the requirements indicated. Expenditures optimized, based on the established goals.	

## 12.1 Purchases and Procurement.

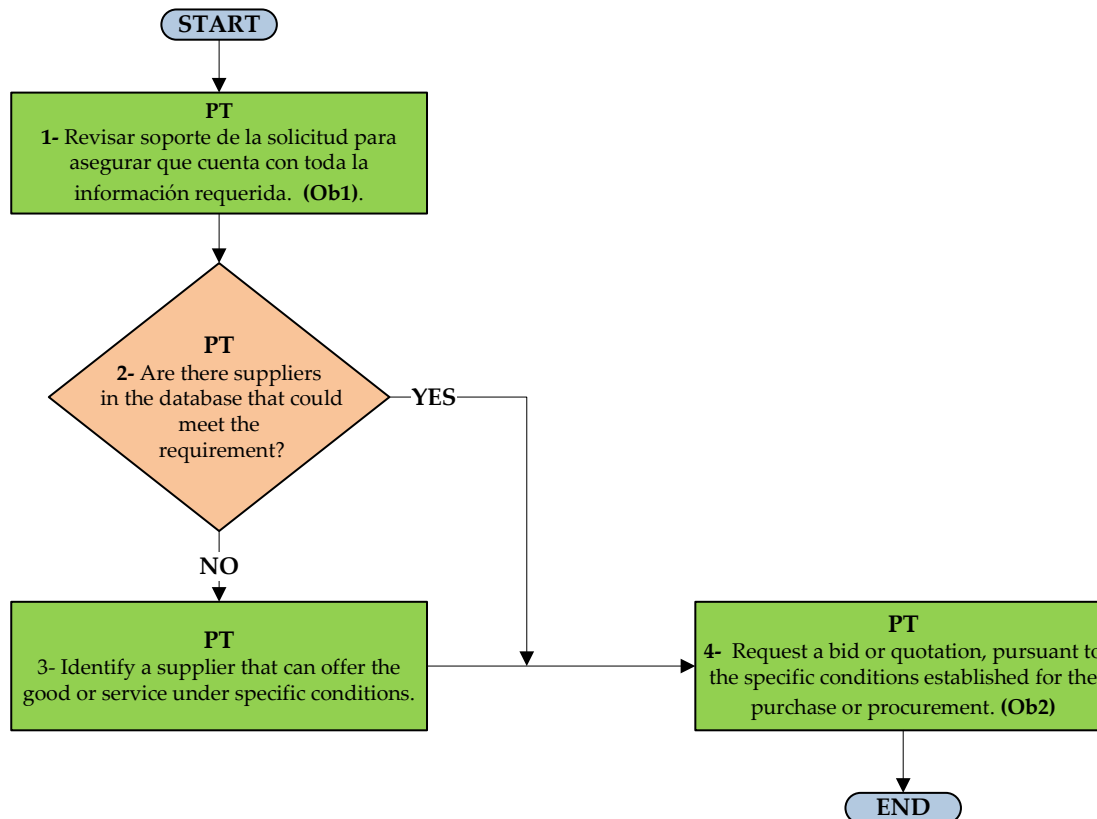
### 12.1.5 Direct Contracting.

INVOLVED

**Administrative Services Manager (ASM)**  
**Procurement Technician (PT)**  
**Warehouse Clerk (WC)**  
**Requesting Unit (RU)**  
**Corporate Purchasing Committee (CPC)**

#### Administrative Services Management

#### Comments



**Ob1:** It is important to comply with current regulations regarding the information required to back up a purchase request.

**Ob2:** Move on to activity 1 of subprocess 12.1.9.

**Subprocess**

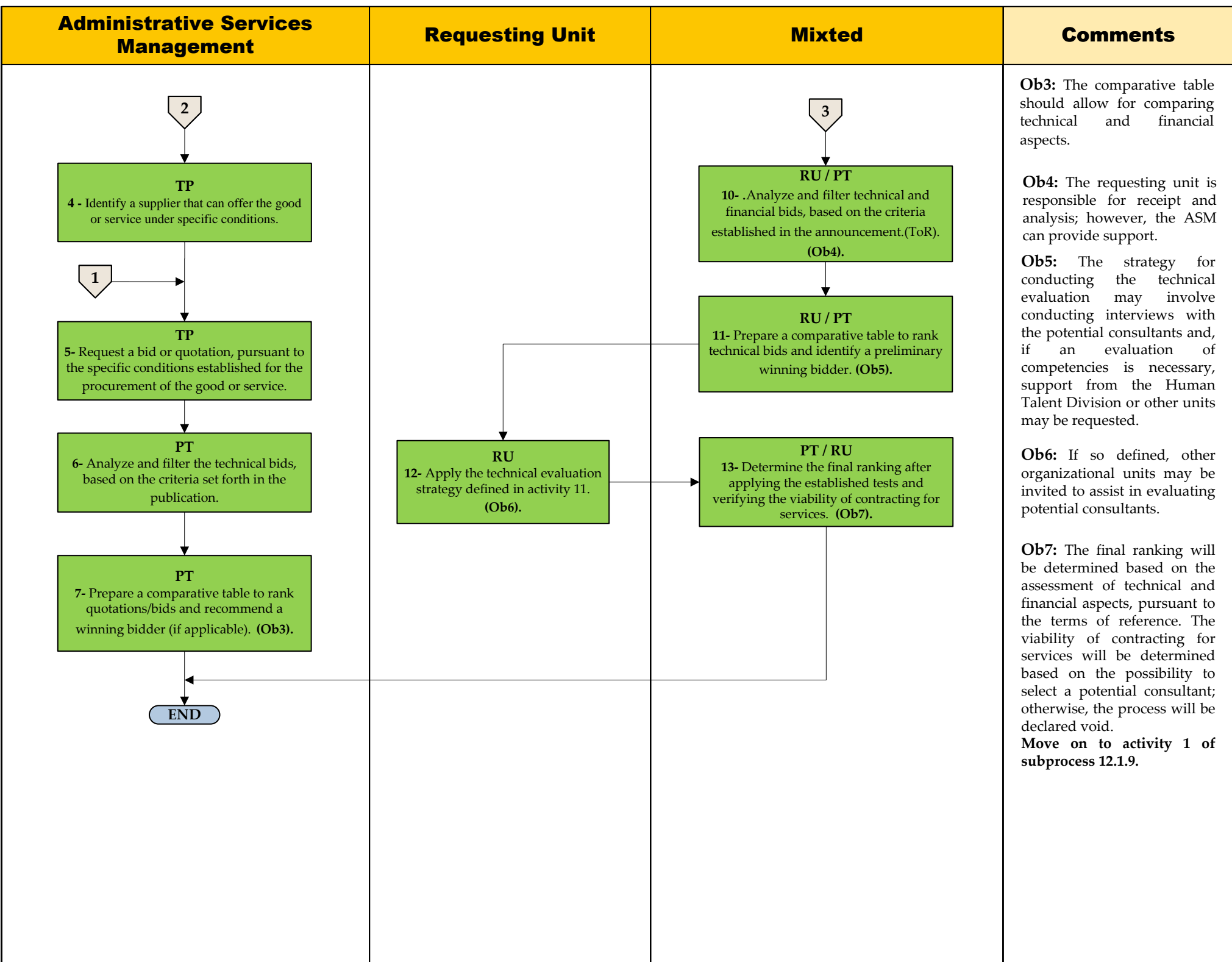
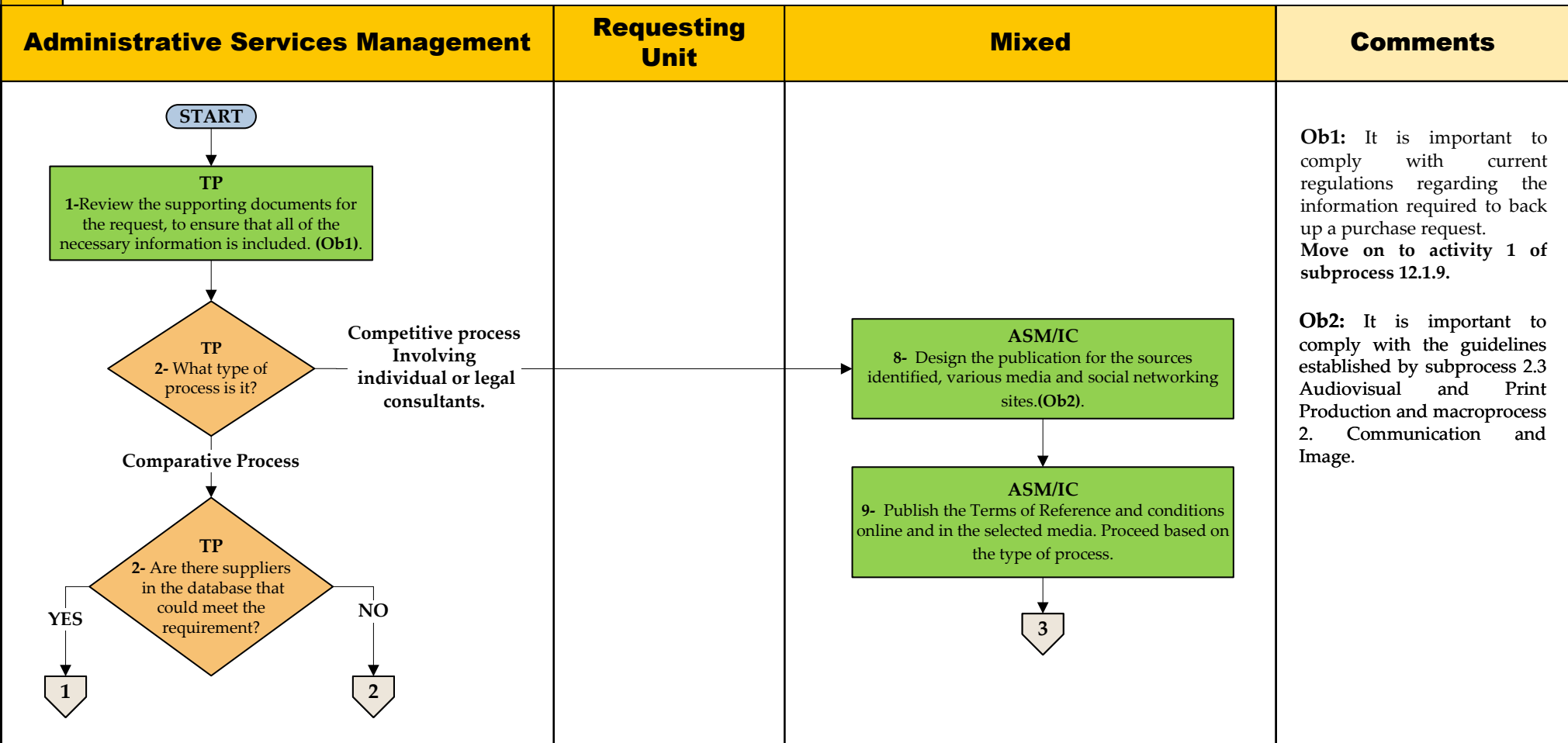
**12.1.6 Contracting by a competitive method for the purchase of goods and/or services.**

<b>Objective</b>	Guarantee the adequate availability of goods and services, on the basis of efficiency in procurement and adequate expenditure management.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Purchase and contracting requisition submitted via the information system.</li> <li>• Formats for contracts.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Purchase Plan.</li> <li>• Annual Action Plan (AAP).</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Financial Rules.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	<p>Movable and immovable property as well as services procured in a timely manner and in accordance with the requirements indicated.</p> <p>Expenditures optimized, based on the established goals.</p>	

**12.1 Purchases and Procurement.**

**12.1.6 Contracting by a competitive method for the purchase of goods and/or services.**

**INVOLVED**  
**Administrative Services Manager (ASM)**  
**Procurement Technician (PT)**  
**Warehouse Clerk (WC)**  
**Requesting Unit (RU)**  
**Institutional Communication (IC)**





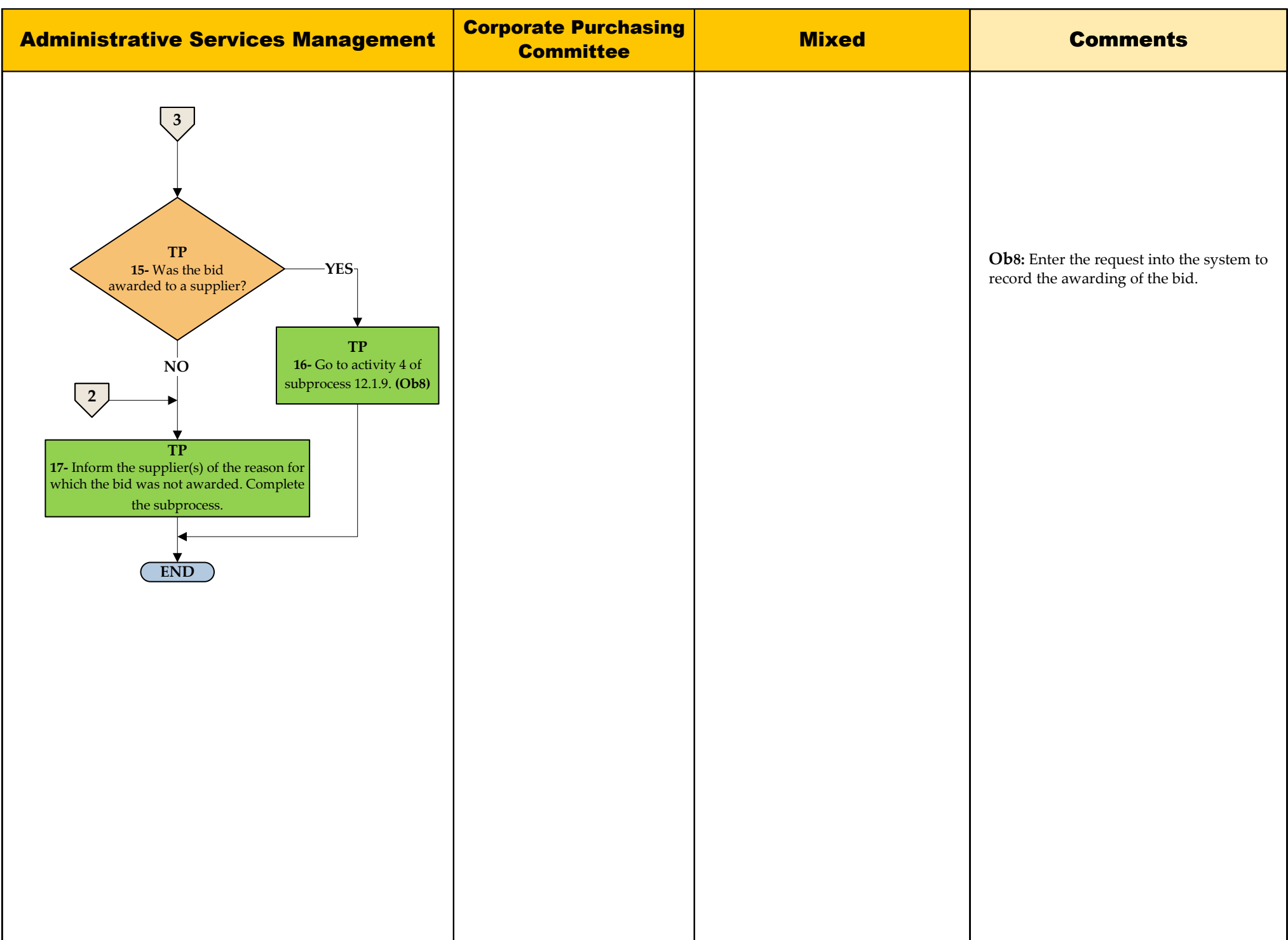
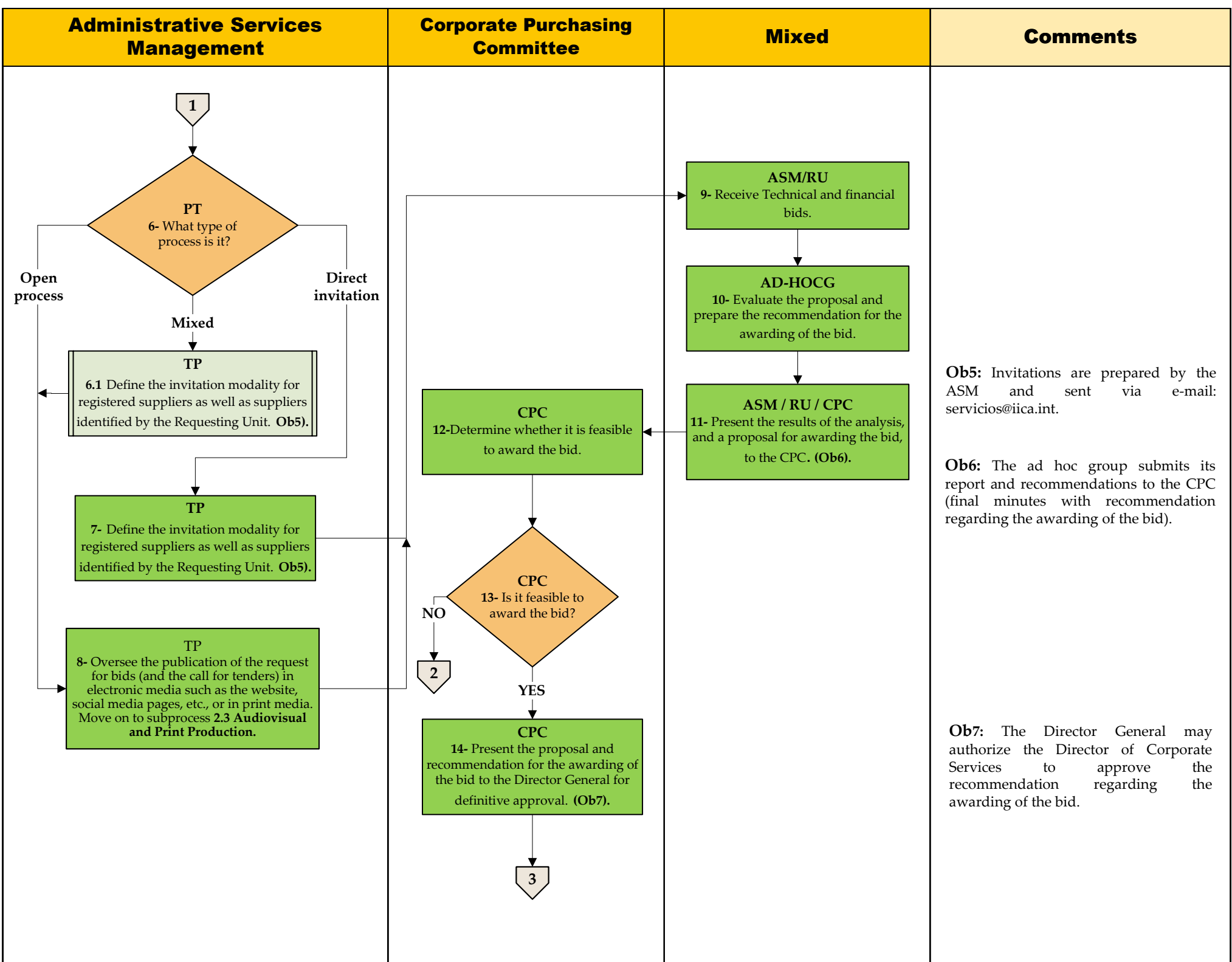
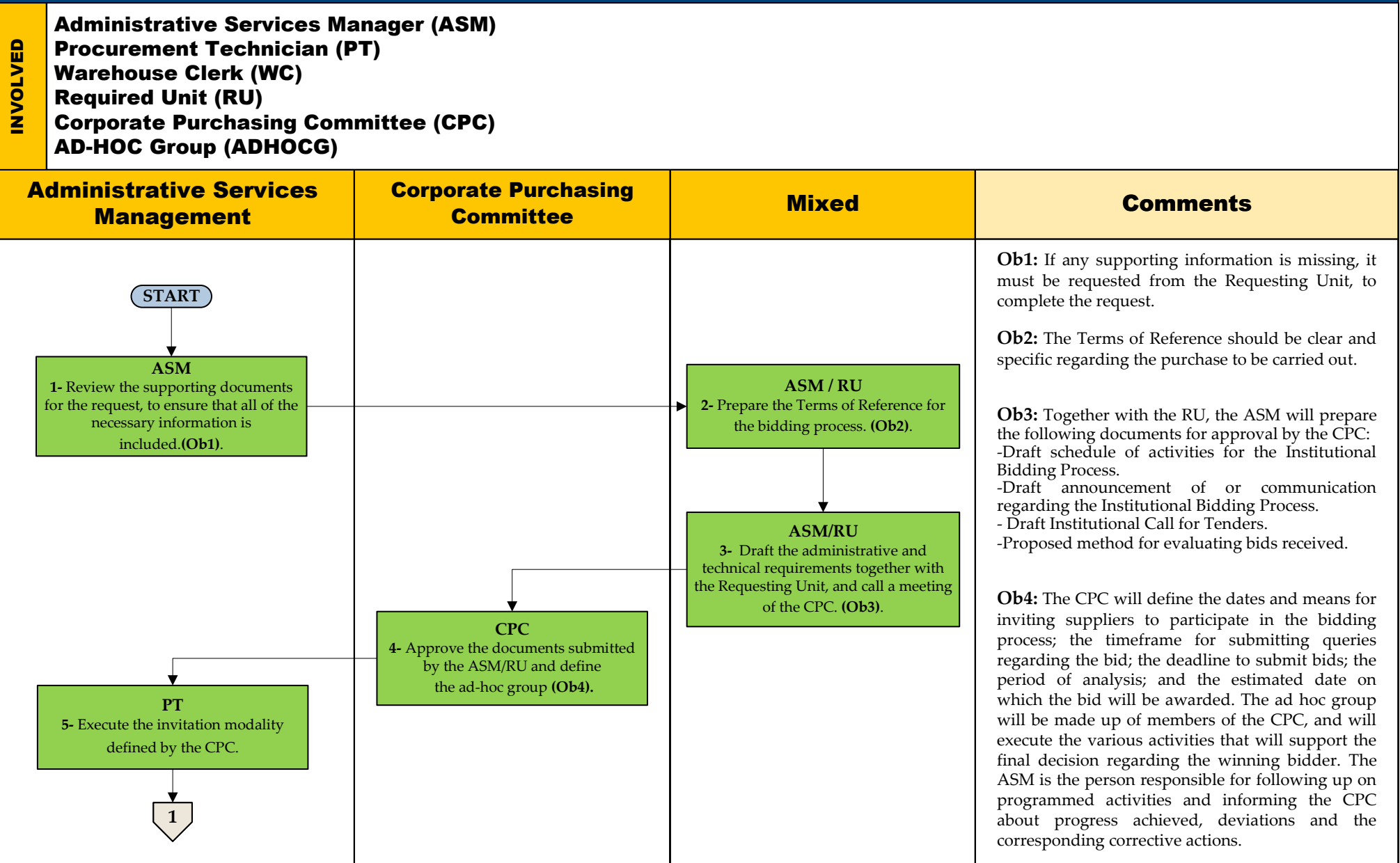
## Subprocess

### 12.1.7 Contracting by bidding.

<b>Objective</b>	Guarantee the adequate availability of goods and services, on the basis of efficiency in procurement and adequate expenditure management.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Purchase and contracting requisition submitted via the information system.</li> <li>• Requests for purchases and/or procurement in the amount of USD 50,000 or more submitted via email, for which a bidding process is required.</li> <li>• Formats for contracts.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Purchase Plan.</li> <li>• Annual Action Plan (AAP).</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Financial Rules.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Movable and immovable property as well as services procured in a timely manner and in accordance with the requirements indicated. Expenditures optimized, based on the established goals.	

**12.1 Purchases and Procurement.**

**12.1.7 Contracting by bidding.**





## Subprocess

### 12.1.8 Hiring of consultants.

<b>Objective</b>	Guarantee the adequate availability of goods and services, on the basis of efficiency in procurement and adequate expenditure management.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Purchase and contracting requisition submitted via the information system.</li> <li>• Requests for purchases and/or procurement in the amount of USD 50,000 or more submitted via email, for which a bidding process is required.</li> <li>• Formats for contracts.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Purchase Plan.</li> <li>• Annual Action Plan (AAP).</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Financial Rules.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Services procured in a timely manner and in accordance with the requirements indicated. Expenditures optimized, based on the established goals.	

**12.1 Purchases and Procurement.**

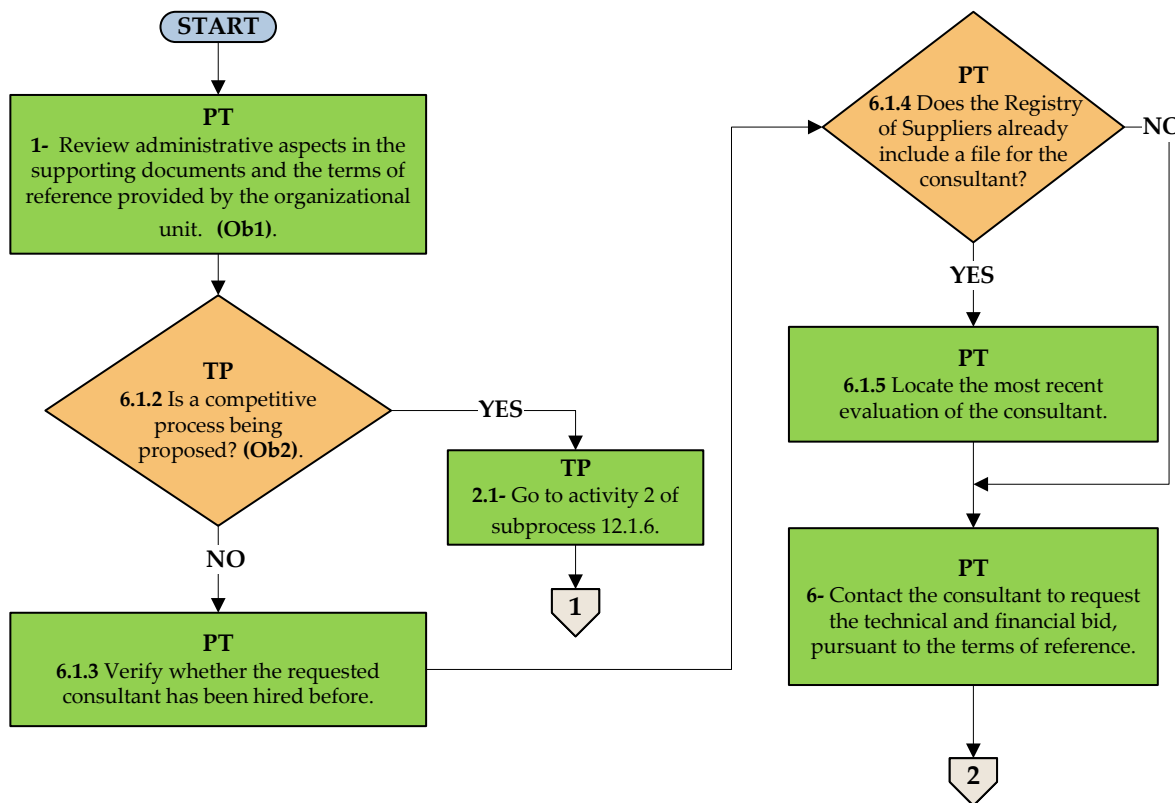
**12.1.8 Hiring of consultants.**

**INVOLVED**  
**Administrative Services Manager (ASM)**  
**Procurement Technician (PT)**  
**Warehouse Clerk (WC)**  
**Corporate Purchasing Committee (CPC)**

**Administrative Services Management**

**Mixed**

**Comments**



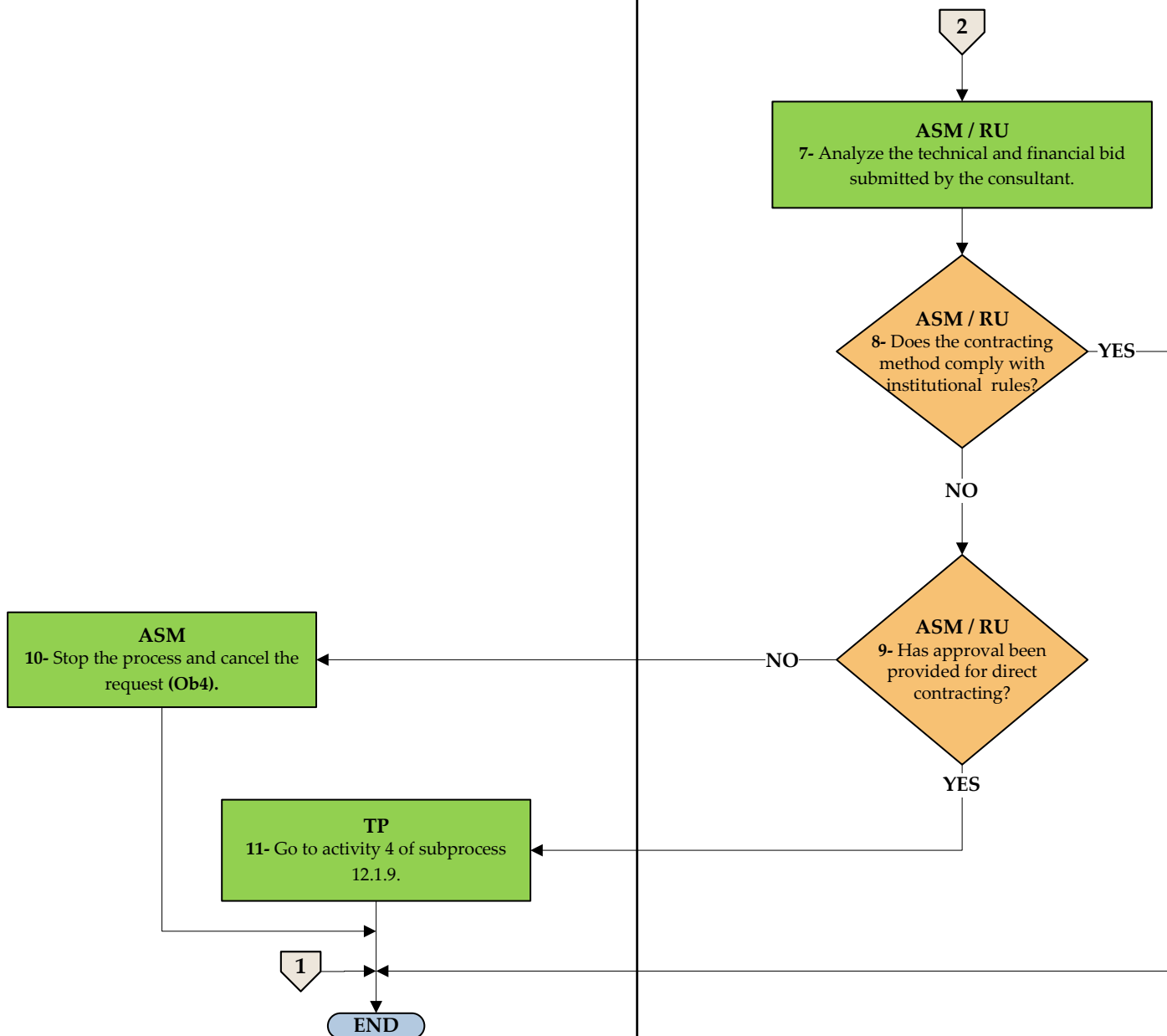
**Ob1:** Requests for individual And legal consultants will be addressed by conducting a competitive process that is specific to that type of contract. Direct contracting may be approved as an exception in some cases.

**Ob2:** A request for a specific consultant is considered an exception and must therefore be analyzed and authorized by the Director General and/ or the Director of Corporate Services or explicitly requested by the counterpart (in the case of externally funded projects).

**Administrative Services Management**

**Mixed**

**Comments**



## Subprocess

### 12.1.9 Formalization of the contracting and delivery of the goods or implementation of the service acquired.

<b>Objective</b>	Guarantee the legal protection of the Institute through the formalization of a contract.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Purchase and contracting requisition submitted via the information system.</li> <li>• Requests for purchases and/or procurement in the amount of USD 50,000 or more submitted via email, for which a bidding process is required.</li> <li>• Formats for contracts.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Purchase Plan.</li> <li>• Annual Action Plan (AAP).</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Financial Rules.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Movable and immovable property as well as services procured in a timely manner and in accordance with the requirements indicated. Expenditures optimized, based on the established goals.	

**12.1 Purchases and Procurement.**

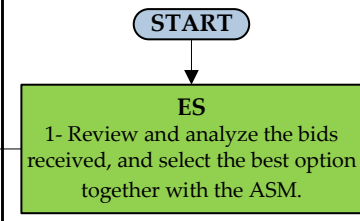
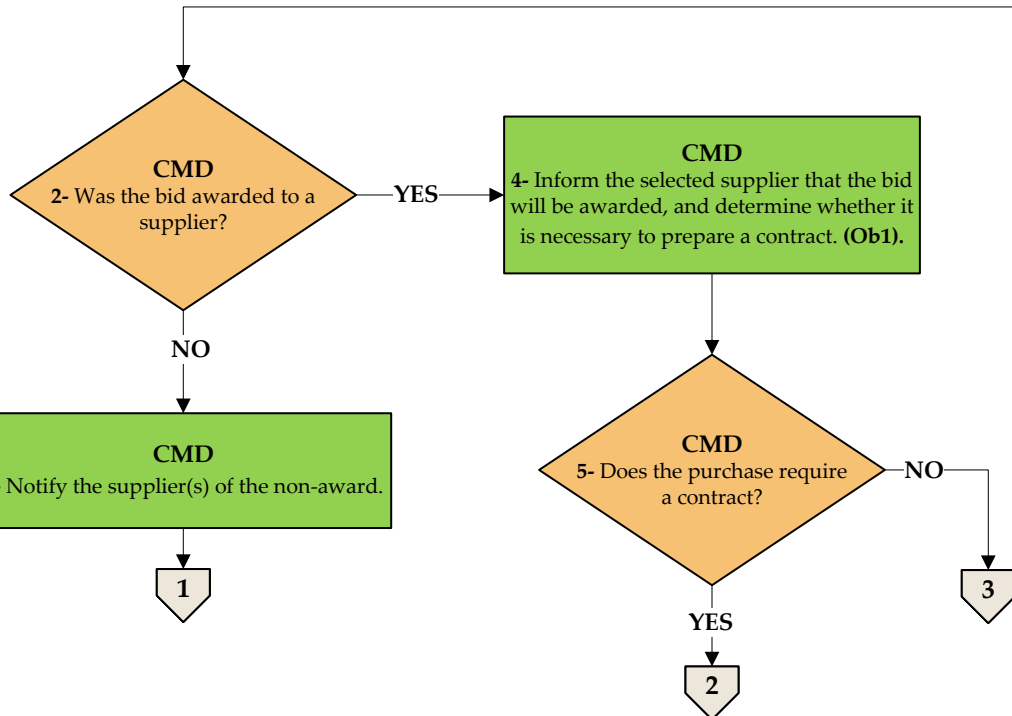
**12.1.9 Formalization of the contracting and delivery of the goods or implementation of the service acquired.**

**INVOLVED**  
Administrative Services Manager (ASM)  
Warehouse Clerk (WC)  
Contract Management Division (CMD)  
Requesting Unit (RU)

**Administrative Services Management**

**Requesting Unit**

**Comments**

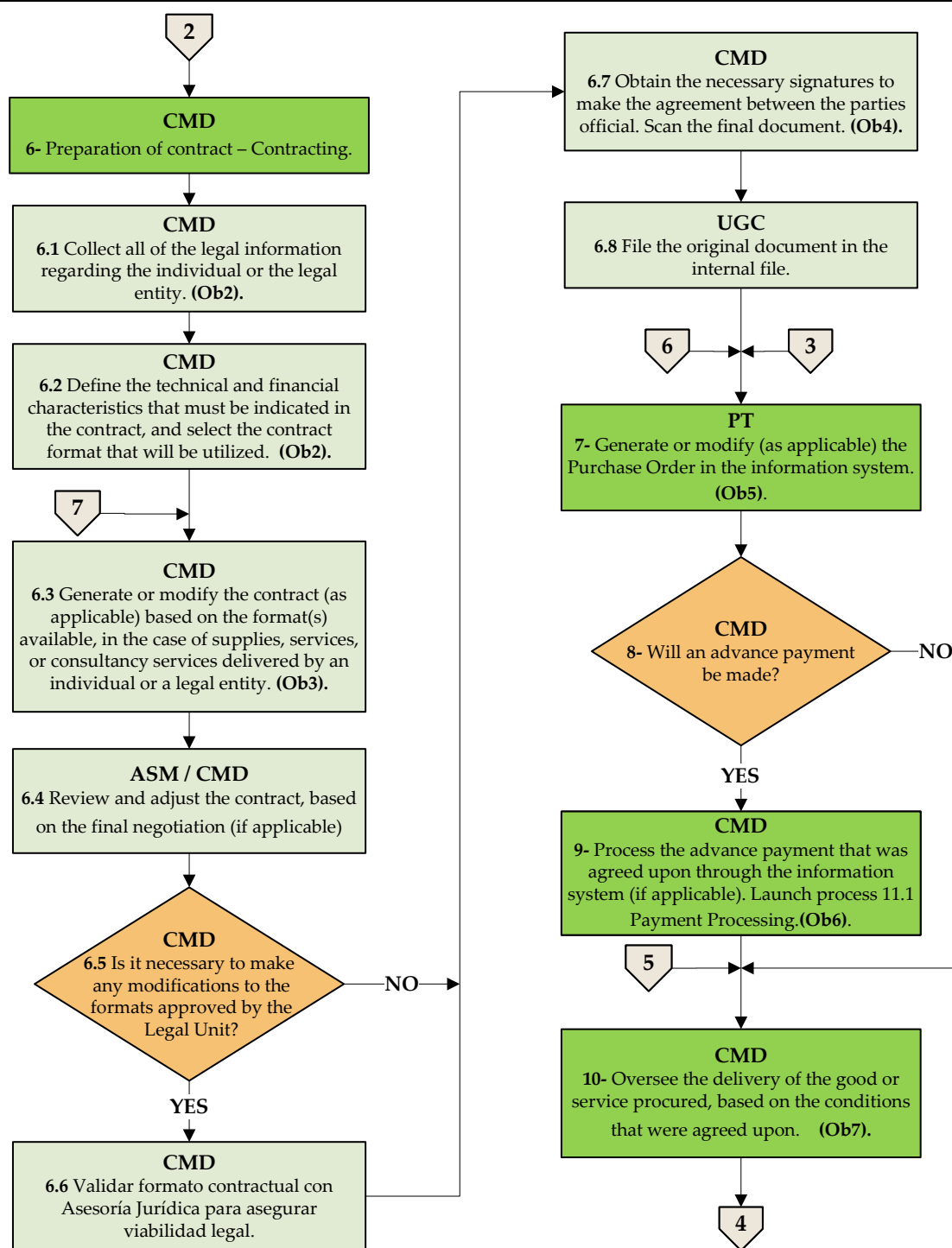


**Ob1:** A notification indicating that the bid will be awarded, as well as the conditions of the award or contract, will be provided via the Purchase Order. A contract will always be utilized in the case of individual and legal consultants.

**Administrative Services Management**

**Requesting Unit**

**Comments**



**Ob2:** All of the information received regarding the individual or legal entity must be validated. Any irregularity in the legal information provided may result in the annulment of the award.

**Ob3:** Formats for the procurement of supplies, services or consultancy services delivered by an individual or legal entity will be established together with the Legal Unit and may only be utilized by the ASM. Incorporation into IT systems is recommended.

**Ob4:** The legal representatives of the parties will sign the contract. Scanned or pdf format copies will be saved, to be used as supporting documents for the preparation of the invoice and payment.

**Ob5:** The Purchase Order will be printed, signed and submitted to the supplier in cases where a contract is not required. If the supplier is not registered in the information system, the corresponding information must be recorded, following the established procedures.

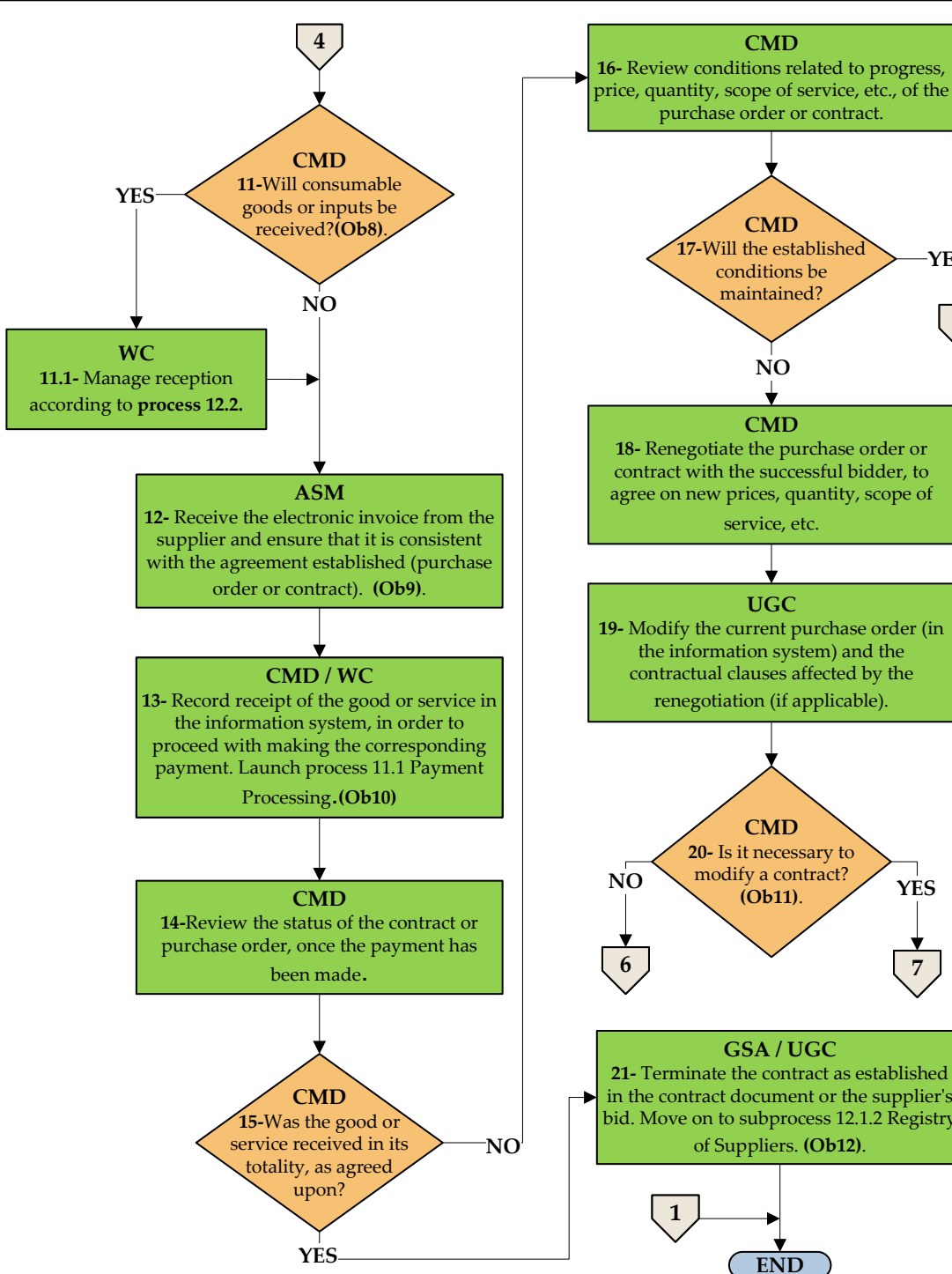
**Ob6:** The supplier will be notified once the advance payment has been made, in accordance with institutional rules. Otherwise, approval will be requested to exceed the value of the required advance payment.

All Purchase Orders involving an advance payment must be accounted for in the invoicing process, for the information of the Warehouse and the Financial Management Division.

**Administrative Services Management**

**Requesting Unit**

**Comments**



**Ob7:** The ASM is responsible for this. However, in the case of consultancies with individuals or legal entities, the requesting unit will be responsible for validating the progress and the delivery of satisfactory results.

**Ob8:** The warehouse clerk will be responsible for receiving consumable goods or inputs.

**Ob9:** The invoice may be provisionally submitted in print form when items are delivered to the warehouse. However, the print invoice will not replace the electronic version. The invoice must correctly reflect the good or service delivered and the price established in the corresponding contract or purchase order.

**Ob10:** In case of goods or supplies, acknowledgement of receipt will be the responsibility of the Warehouse Clerk. In case of technological purchases, consultancies and other services, the requesting unit must acknowledge receipt and its approval of the scope and quality of the deliverable. The necessary documents to support the payment request will be included in the computer system: invoice received, proof of receipt of the good or service, as agreed upon with the supplier. Only in case of suppliers not generating electronic invoices the original invoice will be submitted to the Financial Management Division for processing, along with a request for invoice processing.

**Ob11:** A contract can be modified by generating complementary documents (an addendum) with a predefined format.

**Ob12:** If the contract is terminated, warranties will be returned and agreements or certificates will be signed, as established in the contractual agreement. The hired consultant will be registered (if applicable) and evaluated.

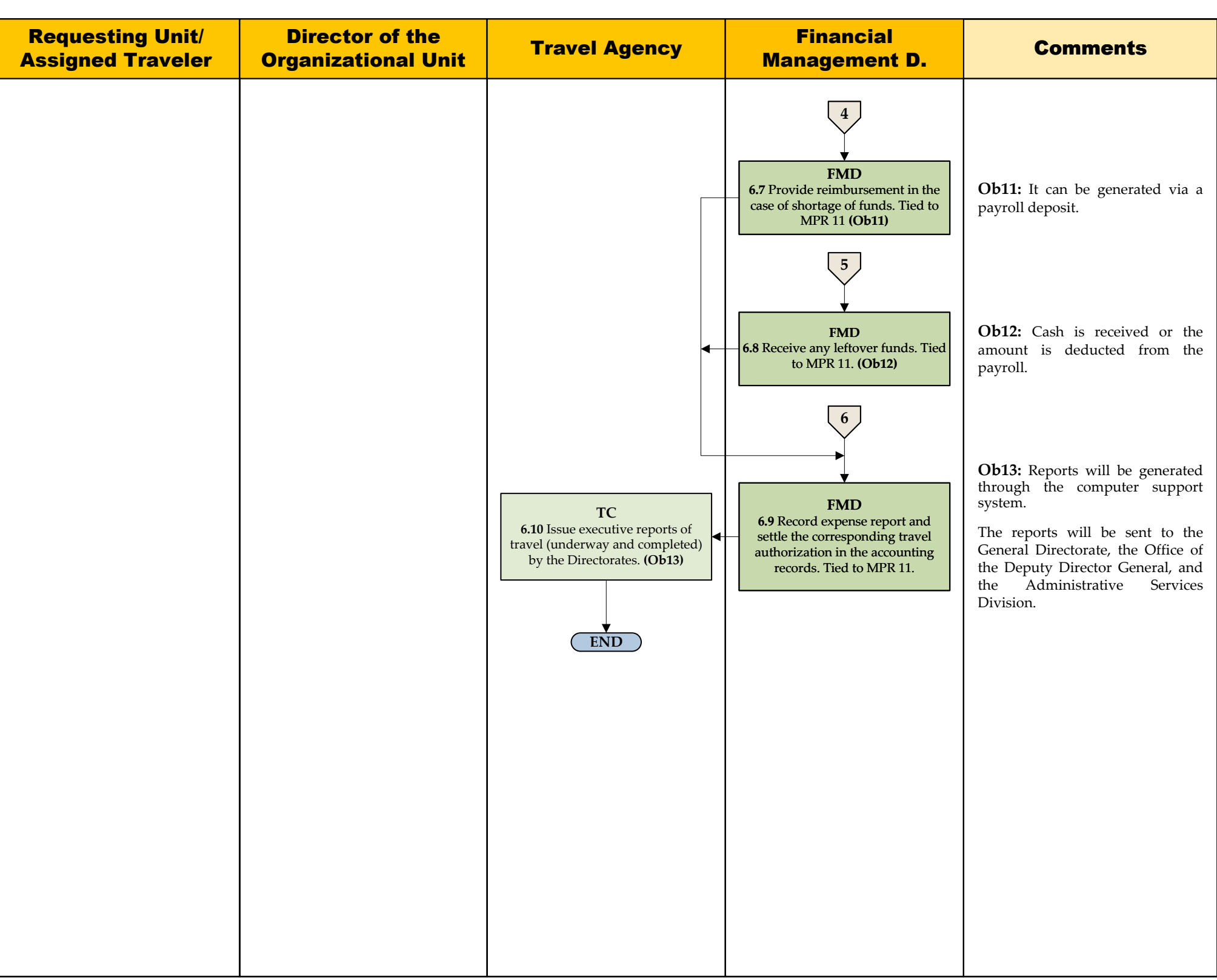
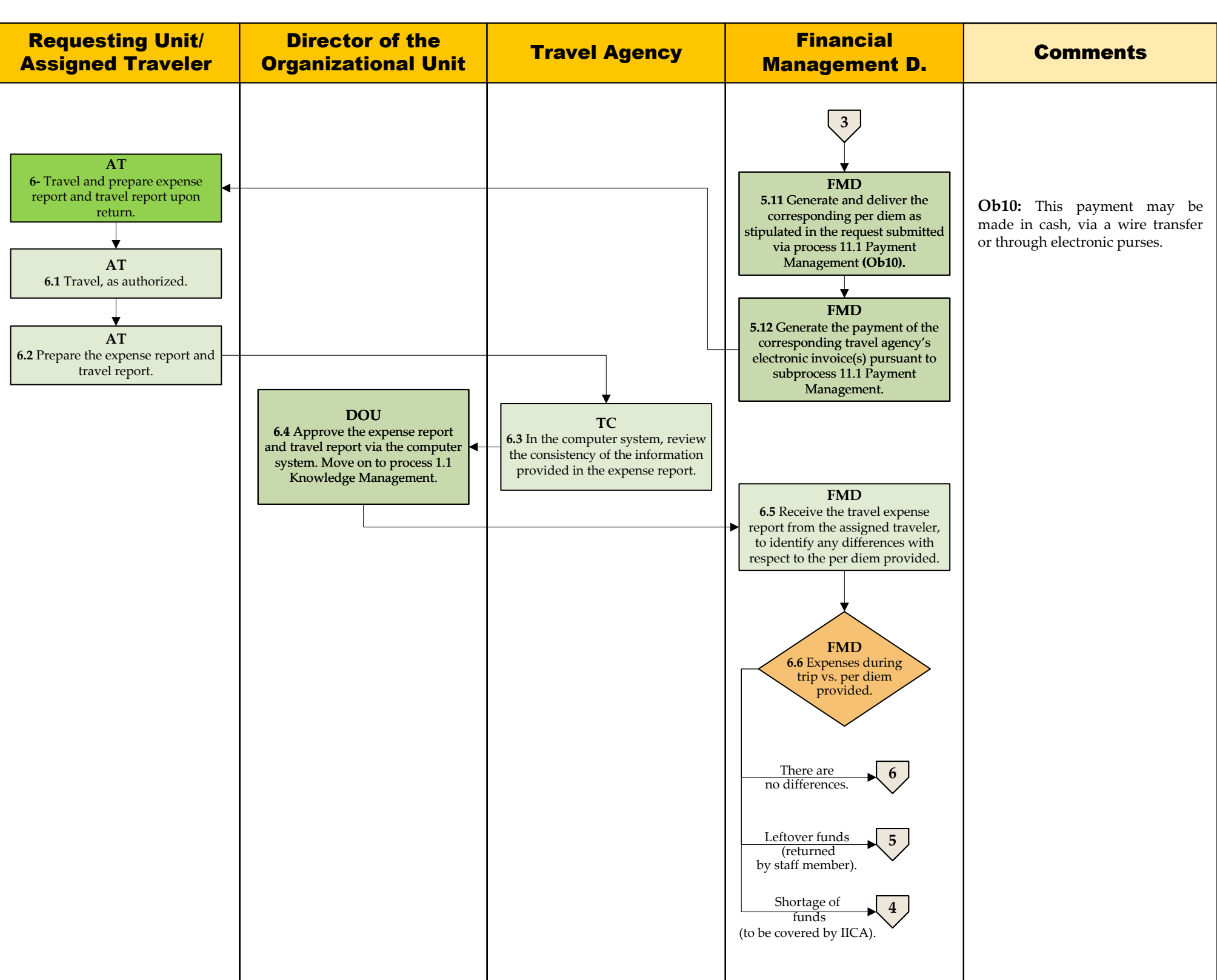
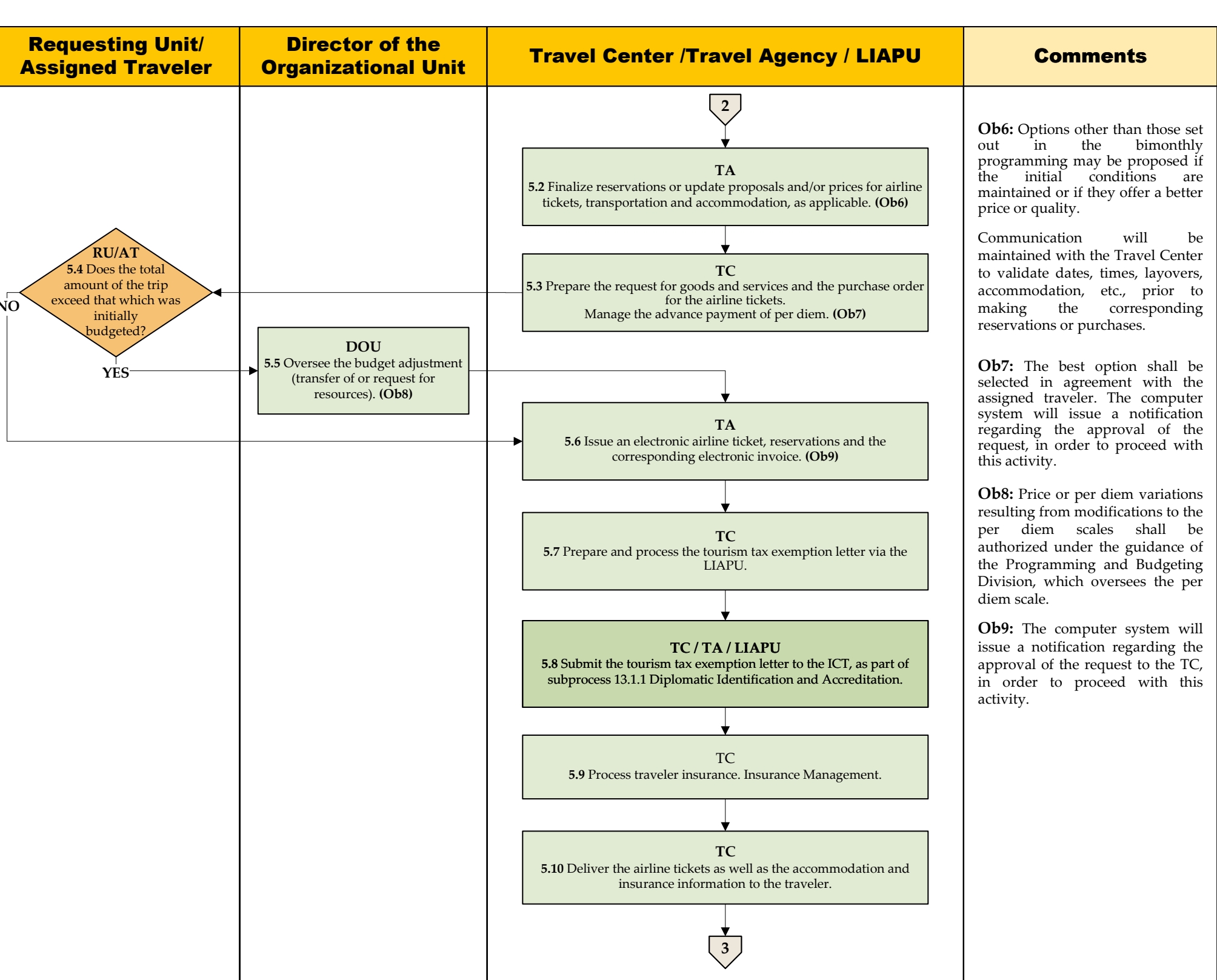
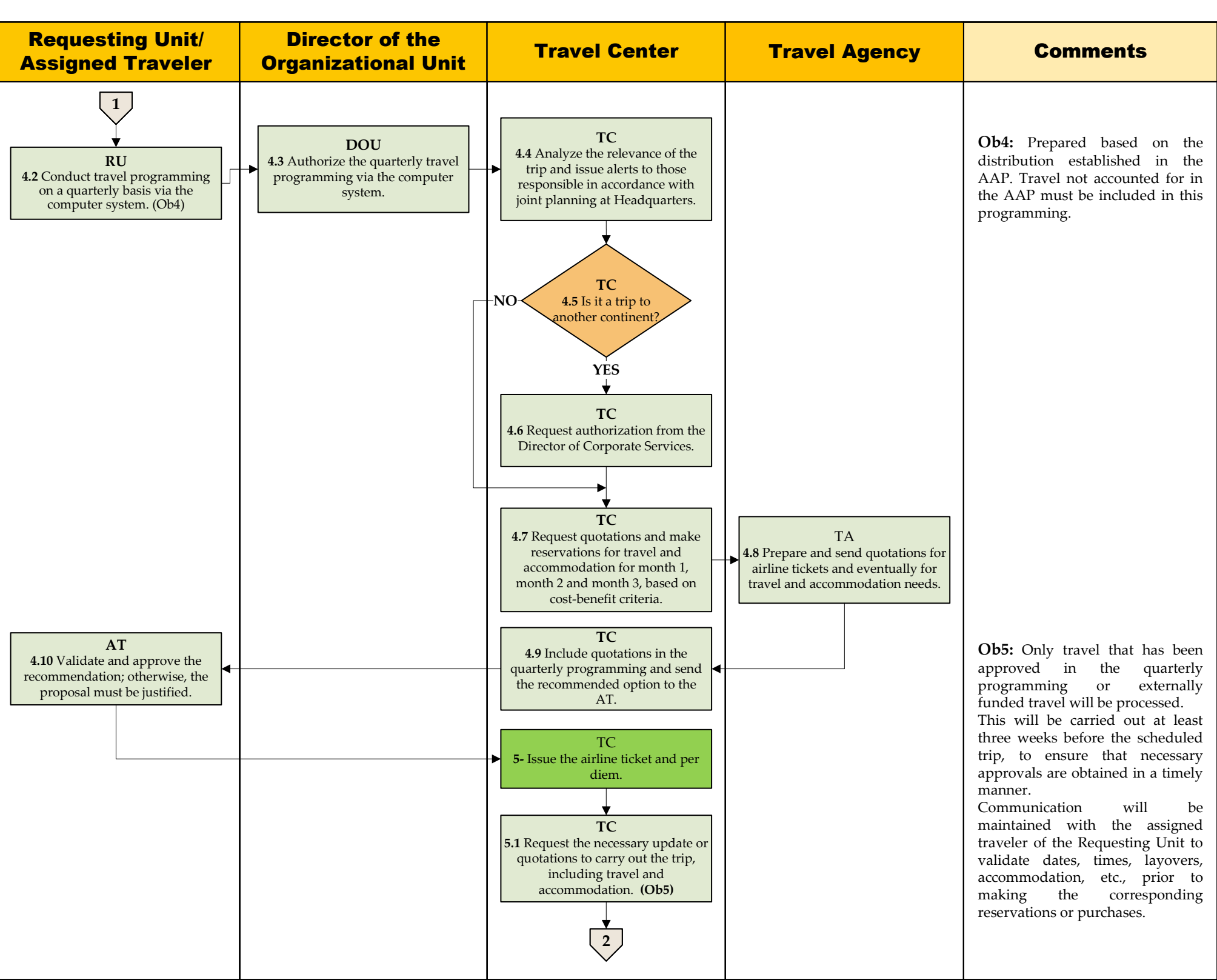
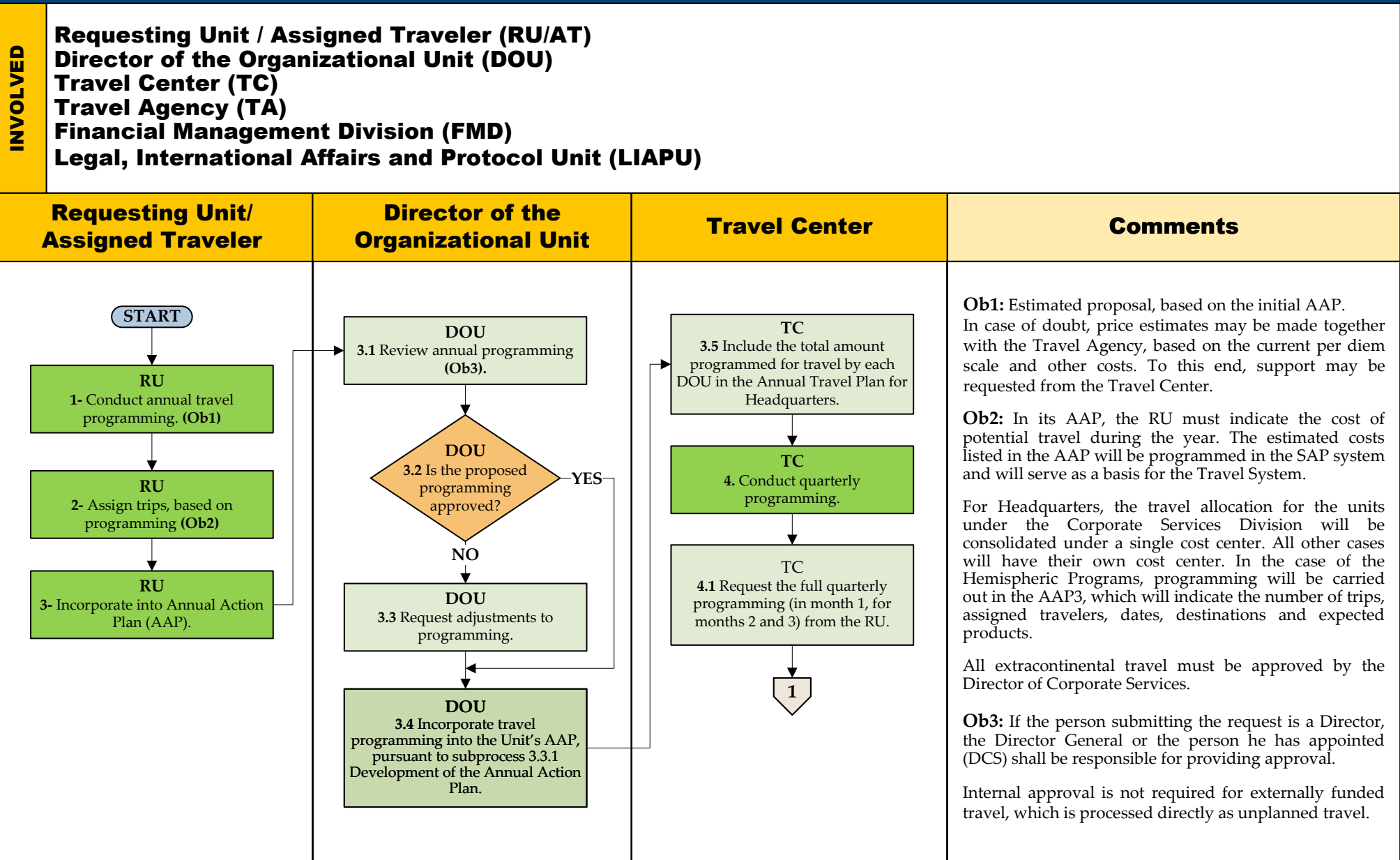
## Subprocess

### 12.1.10 Travel management (planned travel).

<b>Objective</b>	Ensure that IICA is effectively represented at strategic, significant and operational activities that must be carried out in distant locations, providing the traveler and the Institute with the greatest benefit in terms of cost, quality and safety.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Current Annual Action Plan.</li> <li>• Annual travel plan.</li> <li>• Quarterly programming form.</li> <li>• I-4 Form (“Authorization for Official Travel”)</li> <li>• I-5 Form (“Travel Report”)</li> <li>• Format of letter to the ICT to request exemption from travel taxes</li> </ul>	<ul style="list-style-type: none"> <li>• Rules of Procedure of the General Directorate</li> <li>• Staff Rules</li> <li>• Personnel Manual</li> <li>• Institutional plans (MTP, tactical plans for the regions and Headquarters)</li> <li>• Internal rules and regulations</li> <li>• Travel guide (driving action)</li> <li>• Financial Rules</li> <li>• Updated per diem scales</li> <li>• Those defined by the process support systems</li> </ul>
<b>Products</b>	Efficient travel for the IICA traveler. Control and generation of travel reports to facilitate decision making.	

**12.1 Purchases and Contracting.**

**12.1.10 Travel management (planned travel).**





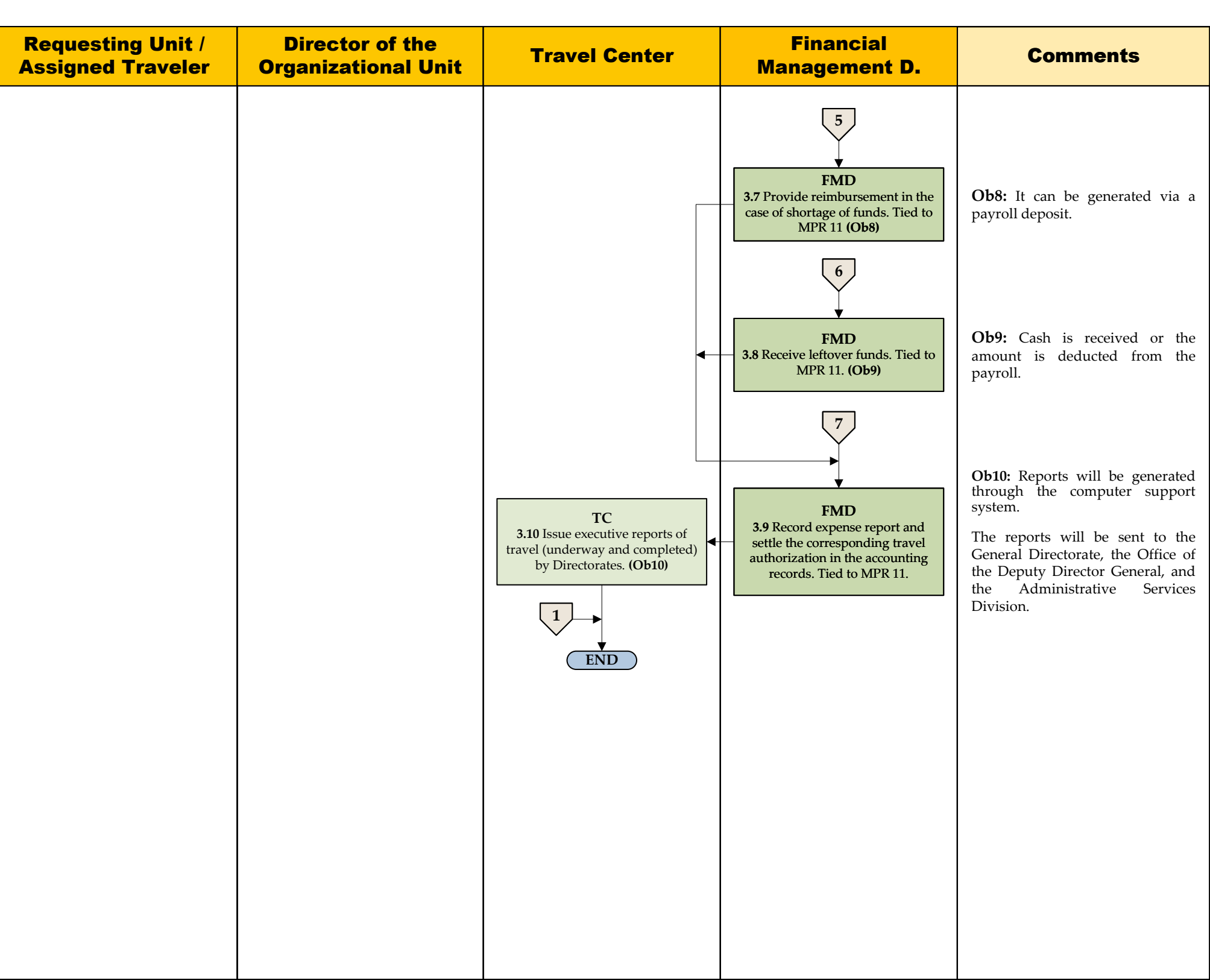
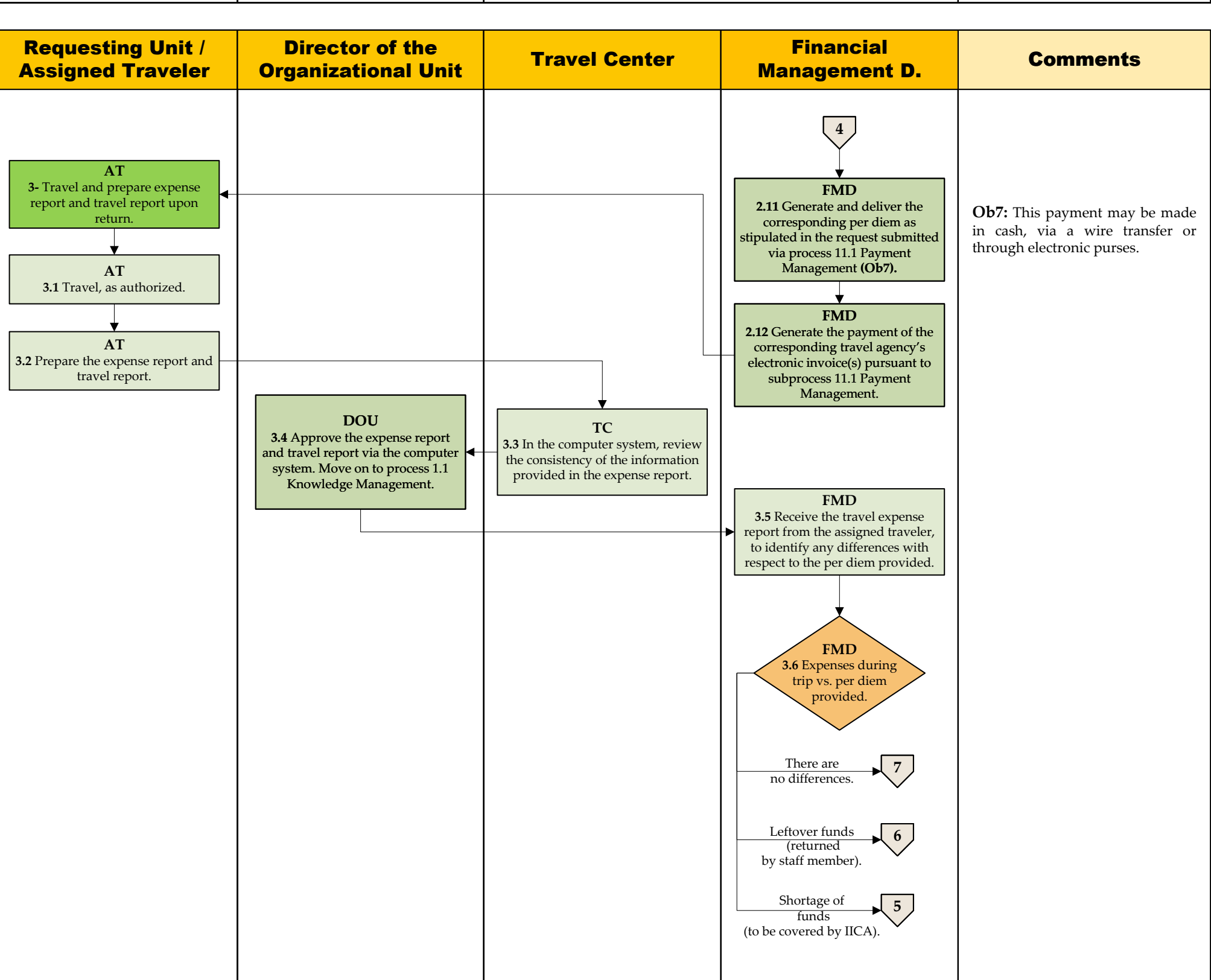
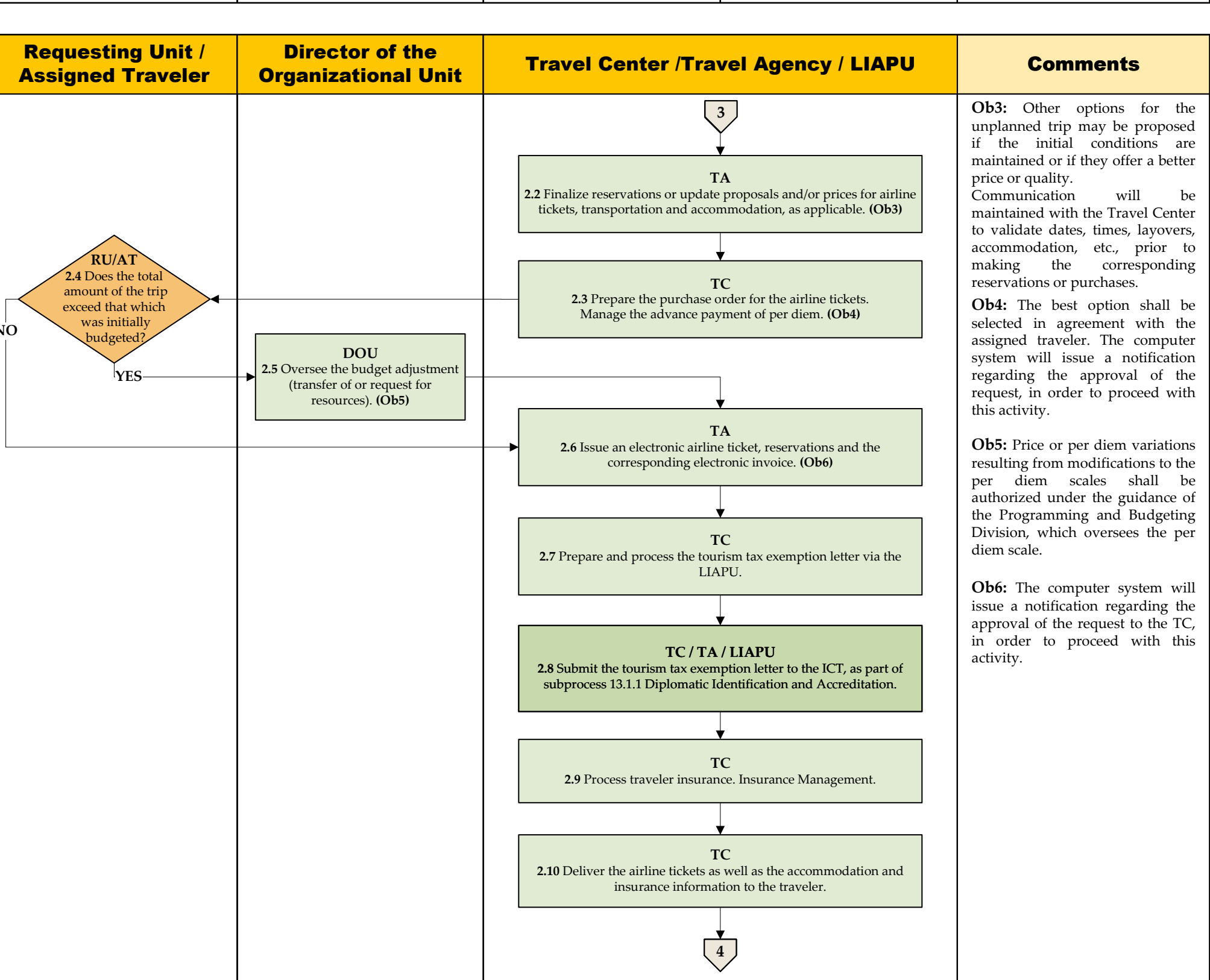
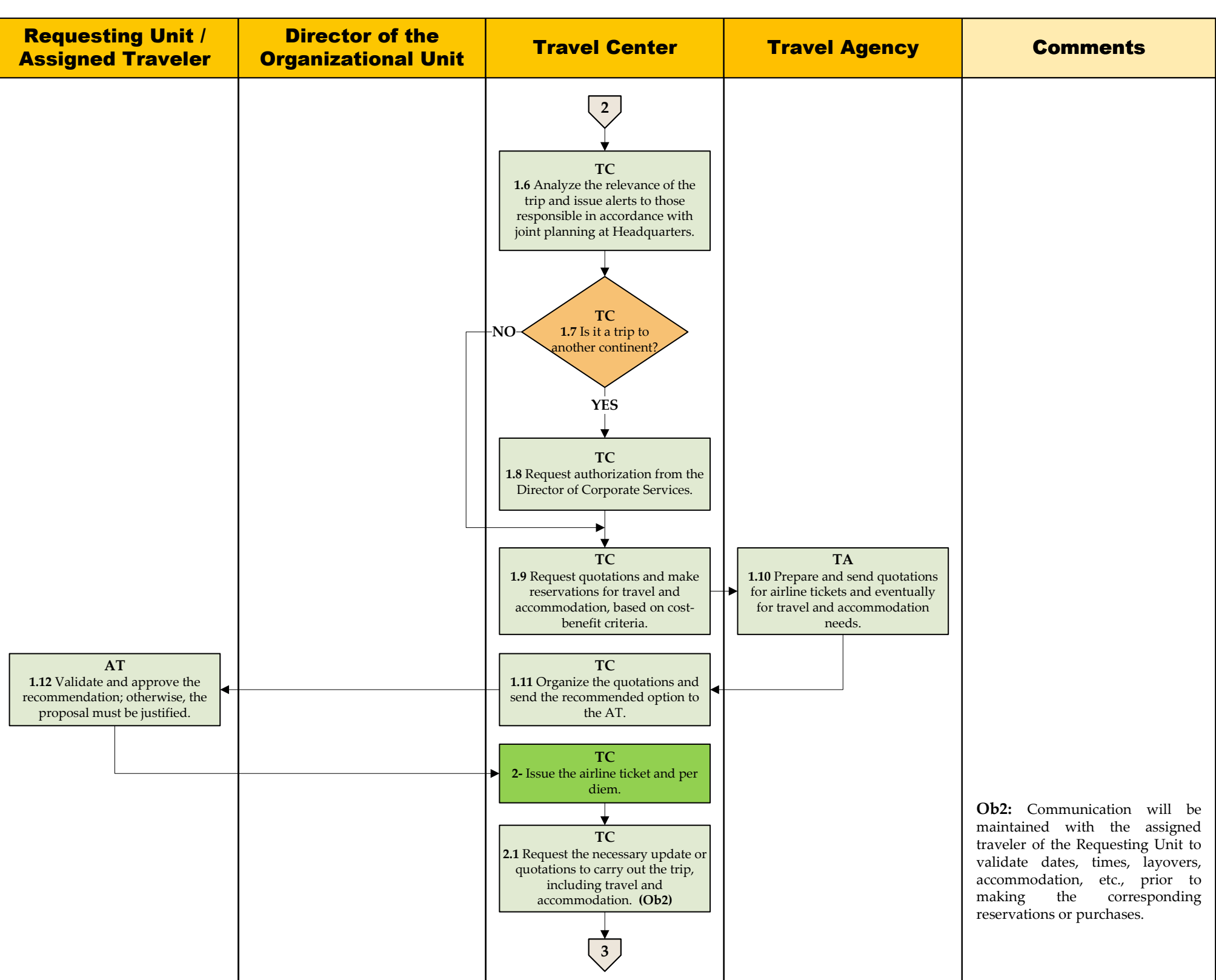
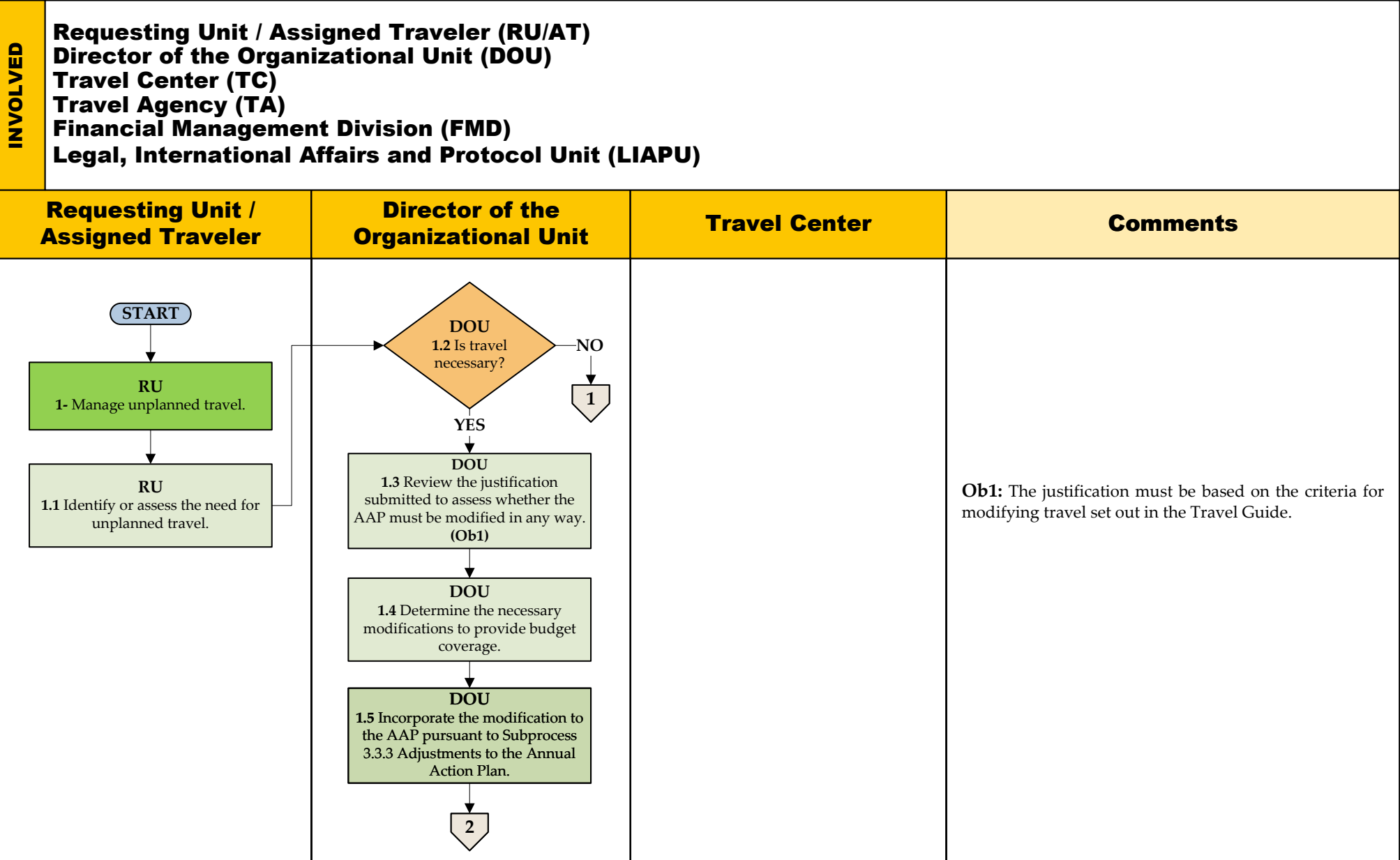
## Subprocess

### 12.1.11 Travel management (unplanned travel)

<b>Objective</b>	Ensure that IICA is effectively represented at strategic, significant and operational activities that must be carried out in distant locations, providing the traveler and the Institute with the greatest benefit in terms of cost, quality and safety.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Current Annual Action Plan.</li> <li>• Annual travel plan.</li> <li>• Quarterly programming form.</li> <li>• I-4 Form (“Authorization for Official Travel”)</li> <li>• I-5 Form (“Travel Report”)</li> <li>• Format of letter to the ICT to request exemption from travel taxes</li> </ul>	<ul style="list-style-type: none"> <li>• Rules of Procedure of the General Directorate</li> <li>• Staff Rules</li> <li>• Personnel Manual</li> <li>• Institutional plans (MTP, tactical plans for the regions and Headquarters)</li> <li>• Internal rules and regulations</li> <li>• Travel guide (driving action)</li> <li>• Financial Rules</li> <li>• Updated per diem scales</li> <li>• Those defined by the process support systems</li> </ul>
<b>Products</b>	Efficient travel for the IICA traveler. Control and generation of travel reports to facilitate decision making.	

**12.1 Purchases and Contracting.**

**12.1.11 Gestión de viajes (no programados).**





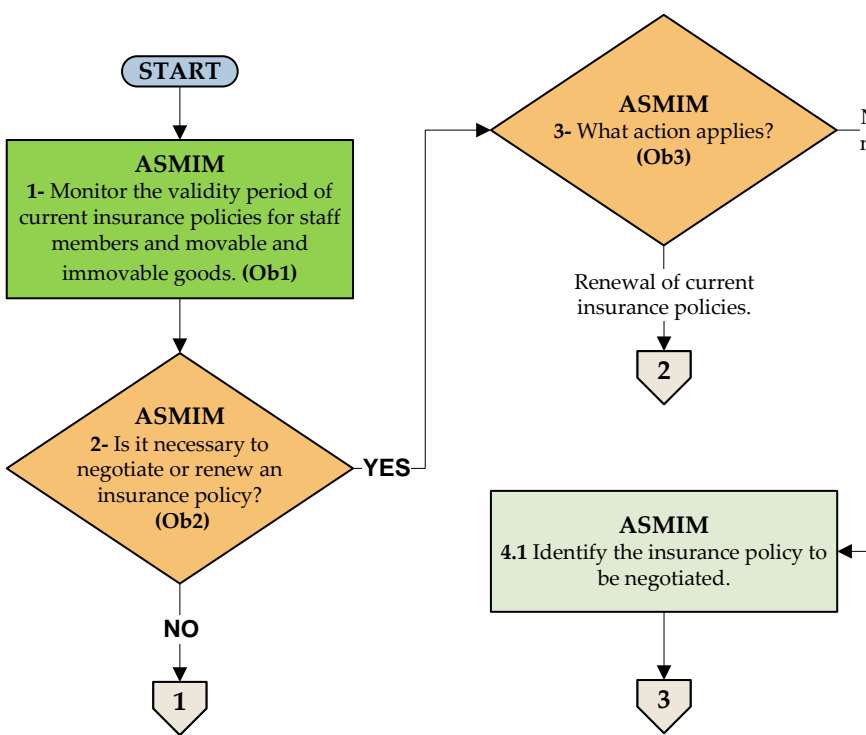
**Subprocess**

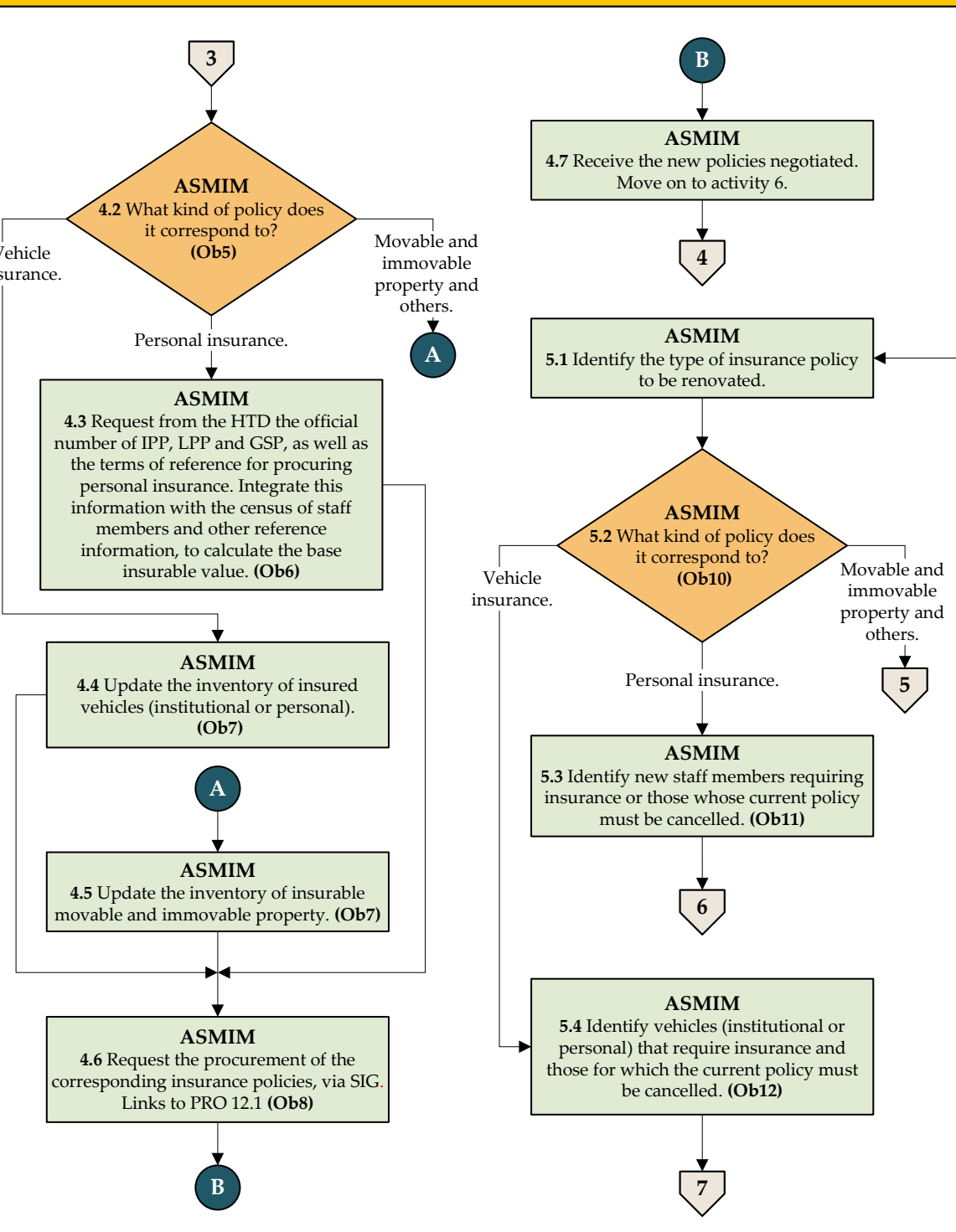
**12.1.12 Management for negotiation or renewal insurances.**

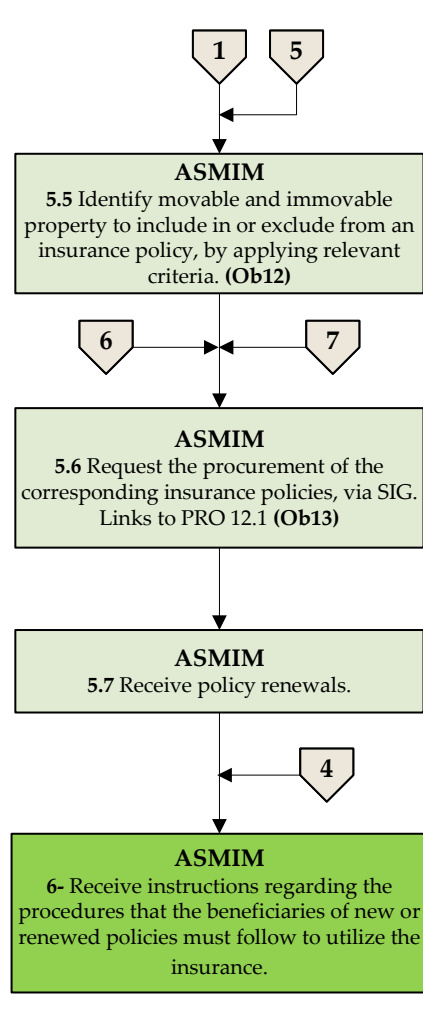
<p><b>Objective</b></p>	<p>Ensure efficient negotiation or renewal of insurance coverage to protect IICA's insurable real and personal property and its staff, securing safe, favorably priced policies that are in line with current regulations and that are delivered with high standards of service.</p>	
<p><b>Inputs</b></p>	<p><b>Background information</b></p>	<p><b>Reference Material</b></p>
	<ul style="list-style-type: none"> <li>• Inventory of insurable movable and immovable property and equipment.</li> <li>• Insurance policies for persons or movable and immovable property that must be renewed</li> <li>• Terms of reference for negotiating or renewing insurance policies for persons, vehicles and/or movable and immovable property and equipment.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Annual Action Plan (AAP).</li> <li>• Internal regulations.</li> <li>• Specific procedures defined for each type of service.</li> <li>• Outsourced insurance contracts and maintenance services.</li> <li>• List of staff members.</li> <li>• Those defined by the process support systems.</li> </ul>
<p><b>Products</b></p>	<p>Insurance policies that are current and appropriate for IICA staff members on payroll, as well as its infrastructure and assets.</p>	

**12.1 Purchases and procurement.**

**12.1.12 Management for negotiation or renewal insurances.**

<b>INVOLVED</b>	<p><b>Corporate Services Management* ( CSM )</b>  <b>Administrative Services Manager ( ASM )</b>  <b>Administrative Services Management Insurance Manager ( ASMIM )</b>  <b>International Specialized Insurance Broker ( ISIB )</b>  <b>Human Talent Manager ( HTM )</b>  <b>Financial Manager ( FM )</b></p>	
	<b>Administrative Service Management</b>	<b>Mixed</b>
		<p style="background-color: #90EE90; padding: 5px; border: 1px solid black;">CSM / ASMIM / ISIB 4- Negotiation of new insurance policies. (Ob4)</p>
	<p style="text-align: right;"><b>Comments</b></p> <p>* The Directorate of Corporate Services shall supervise policy negotiation and renewal and shall establish a multidisciplinary team to support the process, if necessary.</p> <p><b>Ob1:</b> It is important to ensure that the insurance required by IICA and CATIE remains current.</p> <p><b>Ob2:</b> Insurance policies can be negotiated or renewed by means of a direct process carried out by the Administrative Services Division, or through a specialized insurance broker.</p> <p>The HTD should participate in the negotiation process (for personal health, life and dental insurance), with support from the Financial Management Division, assisting in defining the terms of reference as well as studying the proposals received.</p> <p>The estimated duration of negotiation processes should be taken into account to guarantee the continuity of insurance coverage.</p> <p><b>Ob3:</b> New insurance policies should be negotiated in the event of any of the following:          - Updates to institutional policies.          - When the cost of renewing the policy exceeds estimated costs or when coverage conditions deteriorate. Current policies may be renewed provided that price and coverage conditions remain the same or improve.</p> <p><b>Ob4:</b> Ideally, a multidisciplinary team should be established for negotiations, whose composition will depend on the needs of the policy to be negotiated.</p>	

	<b>Administrative Service Management</b>	<b>Mixed</b>	<b>Comments</b>
		<p style="background-color: #90EE90; padding: 5px; border: 1px solid black;">CSM / ASMIM / ISIB 5- Renewal of current policies. (Ob9)</p>	<p><b>Ob5:</b> A list of insurable movable and immovable property, as well as a list of staff members eligible for insurance, must be available.</p> <p><b>Ob6:</b> - Basic life insurance covers all IICA staff members.          - Health insurance policies are available to IPP and LP.          - Personnel may also choose to benefit from specific insurance policies at a personal cost.</p> <p><b>Ob7:</b> This information is taken from the inventories prepared as part of Process 12.3 Maintenance and Safekeeping of Infrastructure and Non-technological Equipment and the records of insured vehicles (IICA, CATIE and staff members).</p> <p><b>Ob8:</b> Links to Process 12.1 Purchases and Procurement.</p> <p><b>Ob9:</b> Ideally, a multidisciplinary team should be established for renovations, whose composition will depend on the needs of the policy to be renovated.</p> <p><b>Ob10:</b> It is important to be aware of insurable movable and immovable property and to have access to the census of staff members who, according to the Human Talent Division, can be insured. The estimated duration of negotiation processes should be taken into account to guarantee the continuity of insurance coverage.</p> <p><b>Ob11:</b> This information is provided by the HTD.</p> <p><b>Ob12:</b> This information is taken from the inventories prepared as part of process 12.3 Maintenance and Safekeeping of Infrastructure and Non-technological Equipment and the records of insured vehicles (IICA, CATIE and staff members).</p>

	<b>Administrative Service Management</b>	<b>Mixed</b>	<b>Comments</b>
		<p style="background-color: #90EE90; padding: 5px; border: 1px solid black;">ASMIM / HTM 7- Disseminate information regarding the conditions and benefits as appropriate.</p> <p style="text-align: center;">END</p>	<p><b>Ob13:</b> Links to Process 12.1 Purchases and Procurement.</p>



**Process**

**12.2 Management of Assets and Supplies.**

<b>Objective</b>	Receive, safeguard and manage inventory items as well as provide the institution with movable assets and consumables, with a view to supporting the continuity of processes that depend on the availability of supplies at any given time.
<b>Scope</b>	Hemispheric level. Technical-regulatory actions at the hemispheric level. Centralization at strategic levels and at Headquarters. Decentralization at the tactical and operational levels by region and country.
<b>Specific policies and rules</b>	<ol style="list-style-type: none"> <li>1. All assets delivered to IICA as part of a purchase process must be registered and added to the inventory for management purposes.</li> <li>2. The Administrative Services Manager (ASM) is the person responsible for ensuring that the goods or supplies required by IICA Headquarters or the IICA Delegation in Costa Rica are continuously available, in order to prevent interruptions in institutional processes and facilitate timely purchase processes.</li> <li>3. A plaque with visible and legible identification information must be set on all goods categorized as assets.</li> <li>4. The warehouse must establish minimum and maximum stock counts, as well as provide the necessary space to adequately safeguard stored goods or supplies.</li> <li>5. The logical principal of "first-in first-out" will be applied.</li> <li>6. Any obsolete or deteriorated assets must be taken into account to determine existing stocks</li> </ol>
<b>Information Systems</b>	SAP – FONT (dta bases) - Office - EMail – SIG (GED)
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• Number of disposals in relation to the total number of items in the inventory.</li> <li>• Percentage of provisions made / requests received.</li> <li>• Percentage of provisions made on time (maximum of 3 working days) / requests received.</li> </ul>

<b>Process</b>	<b>Subprocess</b>
12.2 Management of Assets and Supplies.	12.2.1 Inventory of Fixed Assets.
	12.2.2 Receipt of Goods in Warehouse.
	12.2.3 Warehouse Management.
	12.2.4 Disposal of fixed assets.



**Subprocess**

**12.2.1 Inventory of Fixed Assets.**

<b>Objective</b>	Manage the quantity, condition and location of capitalizable and non-capitalizable assets of the institution.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Current inventory of capitalizable and non-capitalizable assets.</li> <li>• Inflow of goods at the institution.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Annual Action Plan (AAP).</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Updated inventory of capitalizable and non-capitalizable assets.	

## 12.2 Management of Assets and Supplies.

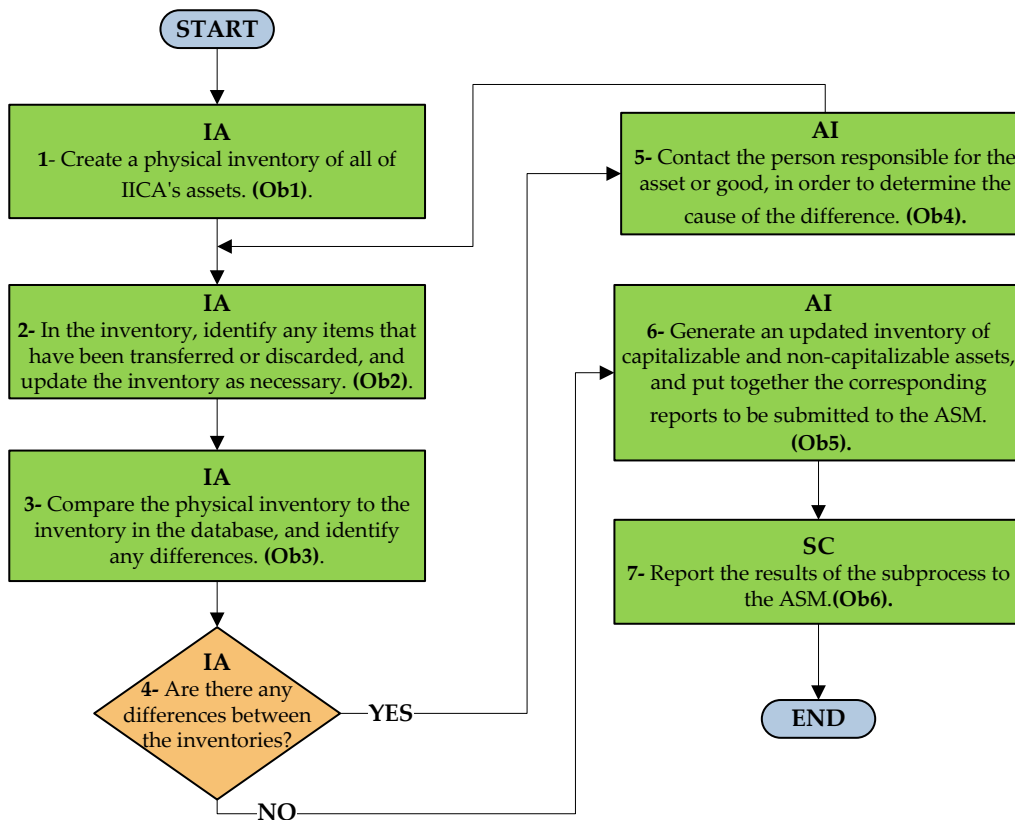
### 12.2.1 Inventory of Fixed Assets.

INVOLVED

**Supply Coordinator (SC)**  
**Inventory Assistant (IA)**  
**Administrative Service Management (ASM)**

#### Administrative Services Management

#### Comments



**Ob1:** The "re-identification" of movable property should be carried out as an exception.

According to Institute rules, a physical inventory of assets must be created on an annual basis. Notifications regarding modifications to the inventory must be reviewed, and used to justify differences. Assets are categorized as: capitalizable assets (value exceeding USD 1,000 - registered in SAP) and non-capitalizable assets (value between USD 100 and 999.99, registered in FONT). Any other assets are categorized as consumables.

**Ob2:** Assets may be deregistered due to lack of use, or because they have become obsolete or lost value. They may be sold or donated to social institutions.

The obsolescence of IT equipment is automatically determined through the maintenance and warranty registration systems.

**Ob3:** Regular updating of the inventory will prevent any differences.

**Ob4:** Failure to provide notifications of transfers or incidents can result in admonition, pursuant to Institute rules.

**Ob5:** The record of acceptance of fixed assets by the user is generated through the GED (processing of general documents). The staff member must sign and submit the form via the GED.

**Ob6:** The ASM may supervise the execution of this subprocess when deemed necessary.



**Subprocess**

**12.2.2 Receipt of Goods in Warehouse.**

<b>Objective</b>	Guarantee the receipt of goods acquired by IICA in accordance with the timeframe, quality and conditions that were agreed upon, and of all goods that enter the warehouse as a result of the Purchases and Procurement process.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	Purchase orders or contracts that involve the delivery of consummable goods or supplies to IICA.	<ul style="list-style-type: none"> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Capitalizable and non-capitalizable assets and consumable goods duly registered and managed.	



## 12.2 Management of Assets and Supplies.

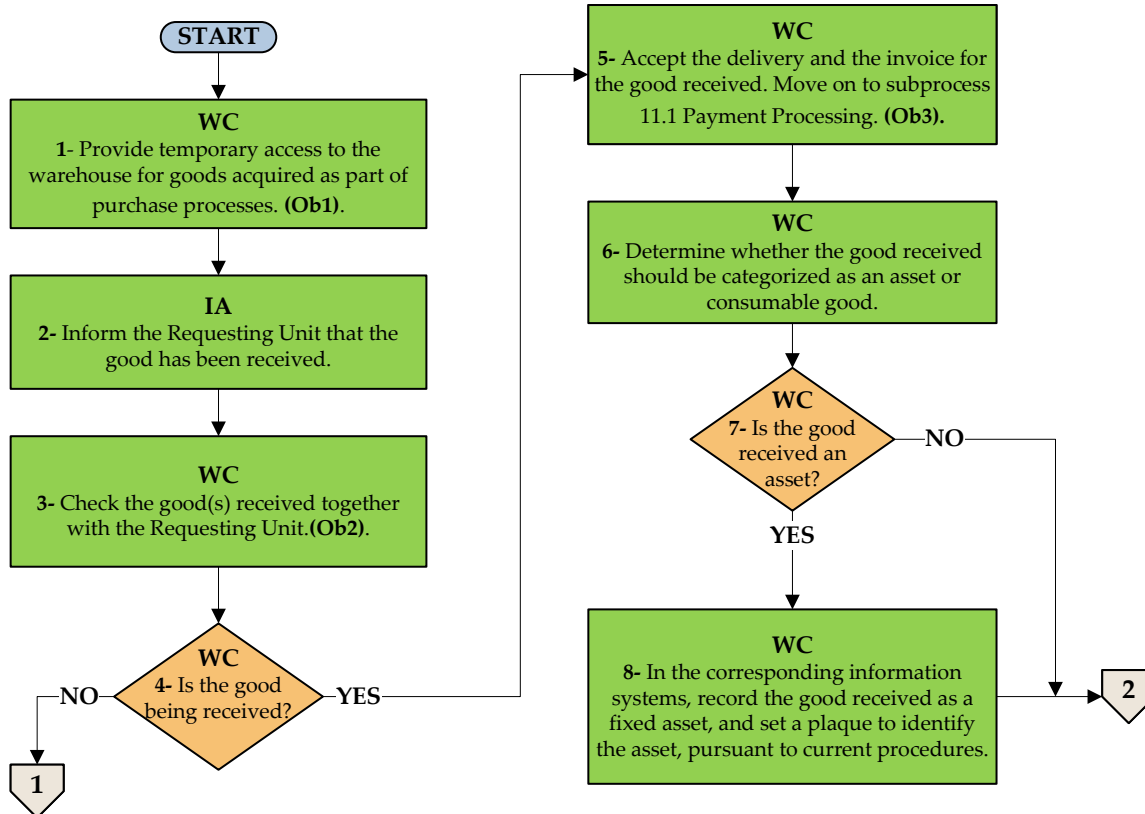
### 12.2.2 Receipt of Goods in Warehouse.

INVOLVED

**Requesting Unit (RU)**  
**Procurement Technician (PT)**  
**Warehouse Clerk (WC)**  
**Inventory Assistant (IA)**

#### Administrative Services Management

#### Comments



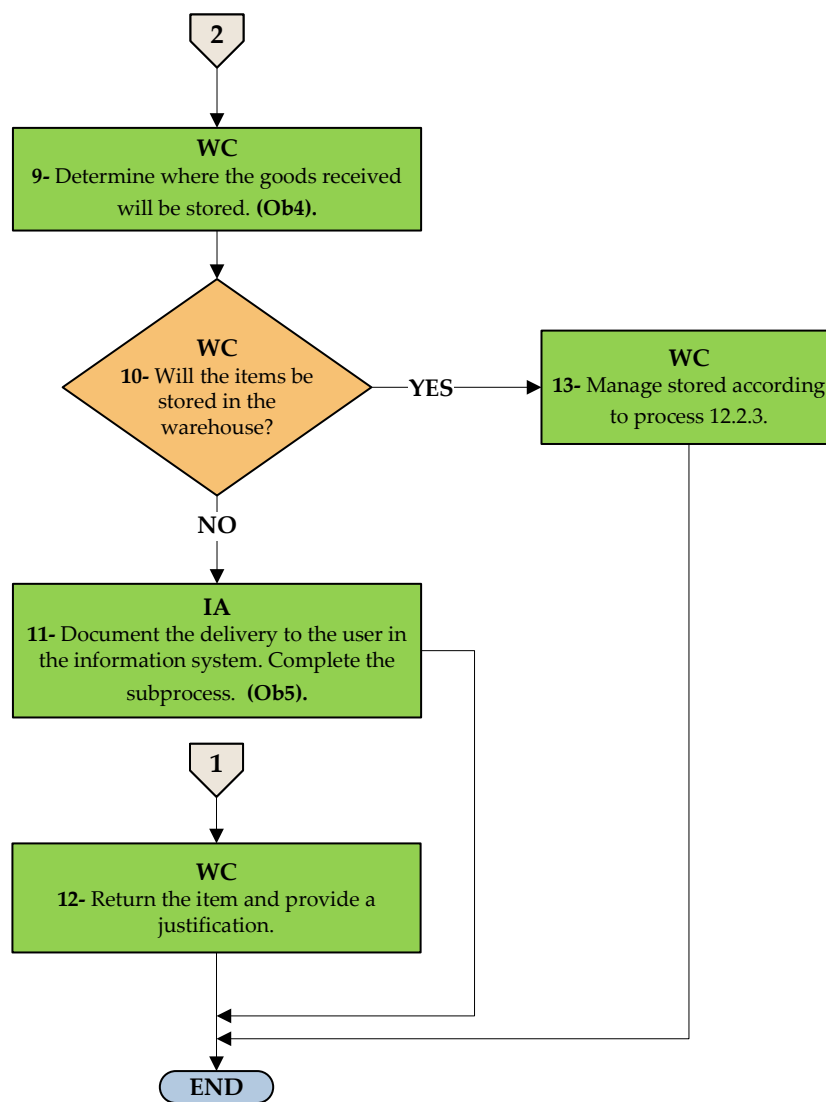
**Ob1:** The invoice must make reference to the corresponding Purchase Order, which will provide information on the required characteristics.

**Ob2:** The good must meet the provisions established in the purchase order or contract signed as part of the purchase process. The staff member who processed the purchase will become involved if there are any queries.

**Ob3:** Proof of delivery will be prepared, pursuant to the purchase order or contract. All of the supporting documents for the payment request will be included in the information system: invoice received, proof of receipt of the good, in accordance with what was agreed upon with the supplier. The ASM will file all of the physical supporting documents that were included. In the case of suppliers that do not generate electronic invoices, the physical invoice will be submitted to the Financial Management Division for processing.

#### Administrative Services Management

#### Comments



**Ob4:** Goods may be stored in the warehouse or immediately delivered to the Requesting Unit.

**Ob5:** Information on the good delivered and the staff member who received it must be recorded.

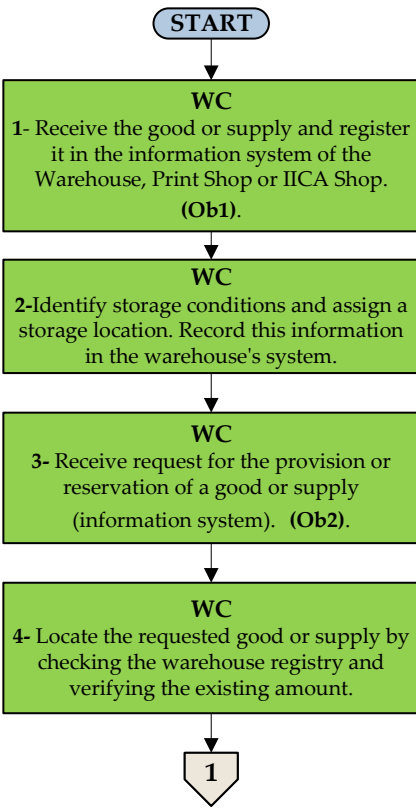
## Subprocess

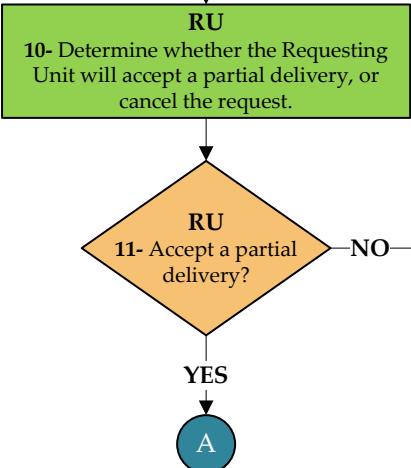
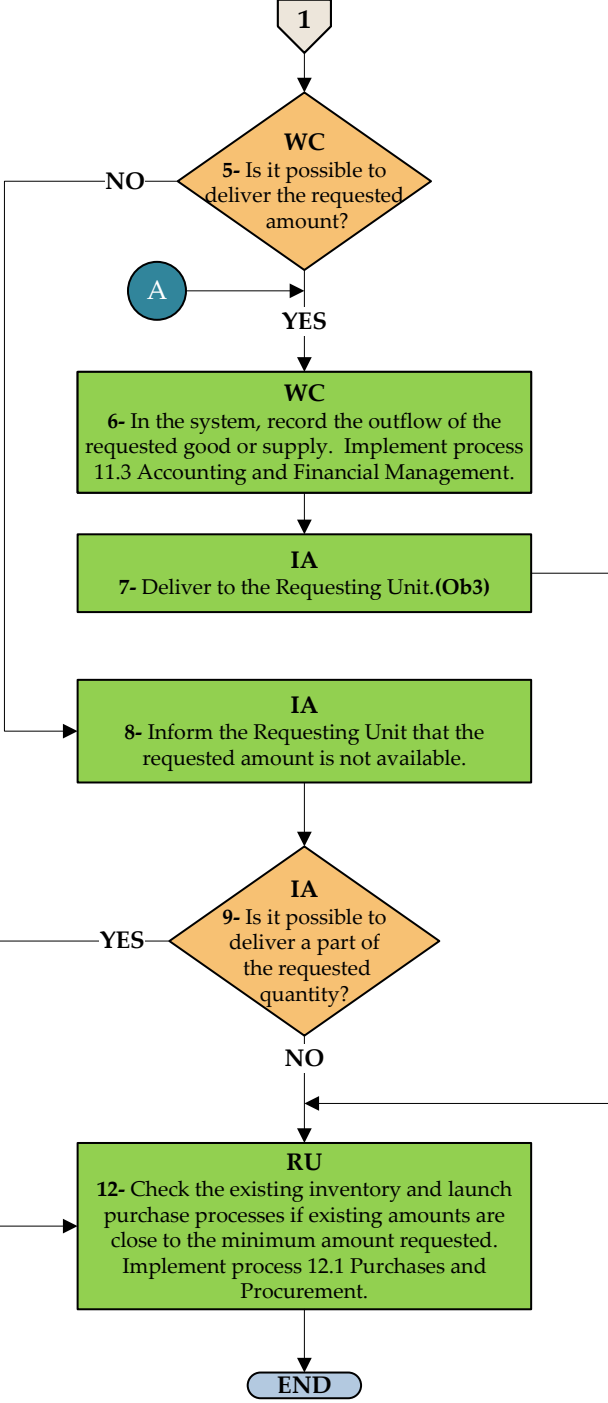
### 12.2.3 Warehouse Management.

<b>Objective</b>	Categorize and register required goods and supplies that arrive at the warehouse as a result of the Purchases and Procurement process.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Goods or supplies that arrive at the warehouse for temporary storage.</li> <li>• Reservations or requests for consumable goods or supplies located in the warehouse.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Annual Action Plan (AAP).</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Timely provision of consumable goods or supplies to the units at IICA Headquarters.	

**12.2 Management of Assets and Supplies.**

**12.2.3 Warehouse Management.**

<b>INVOLVED</b>	<b>Requesting Unit ( RU )</b> <b>Warehouse Clerk (WC)</b> <b>Inventory Assistant (IA)</b>	
	<b>Requesting Unit</b>	<b>Administrative Services Management</b>
		<p><b>Ob1:</b> The record should indicate the inventory code, quantity, supplier and entry date.</p> <p><b>Ob2:</b> Information regarding the budget item that will cover the requested item must be provided.</p>

<b>Requesting Unit</b>	<b>Administrative Services Management</b>	<b>Comments</b>
		<p><b>Ob3:</b> The IA delivers the goods or supplies, and the requesting party signs the delivery document (goods issue) to acknowledge receipt.</p>



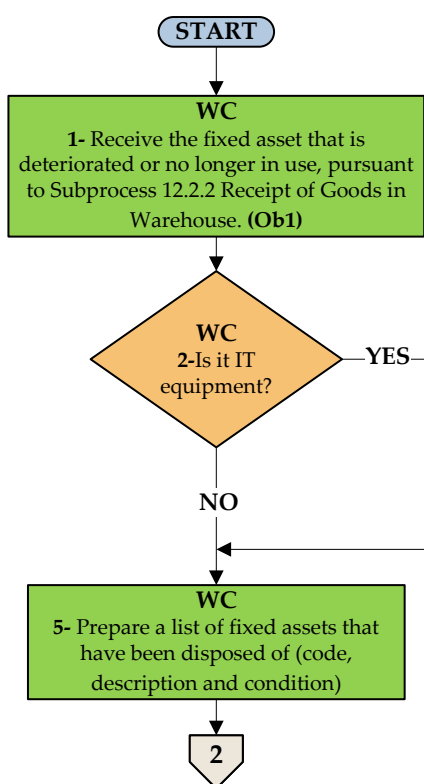
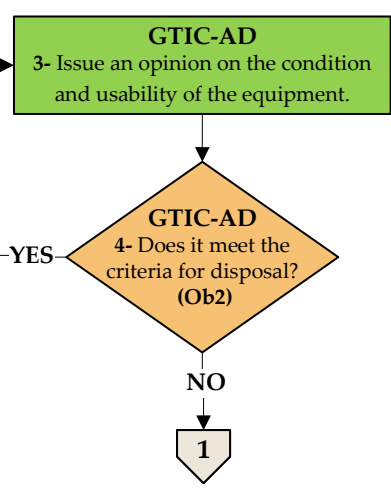
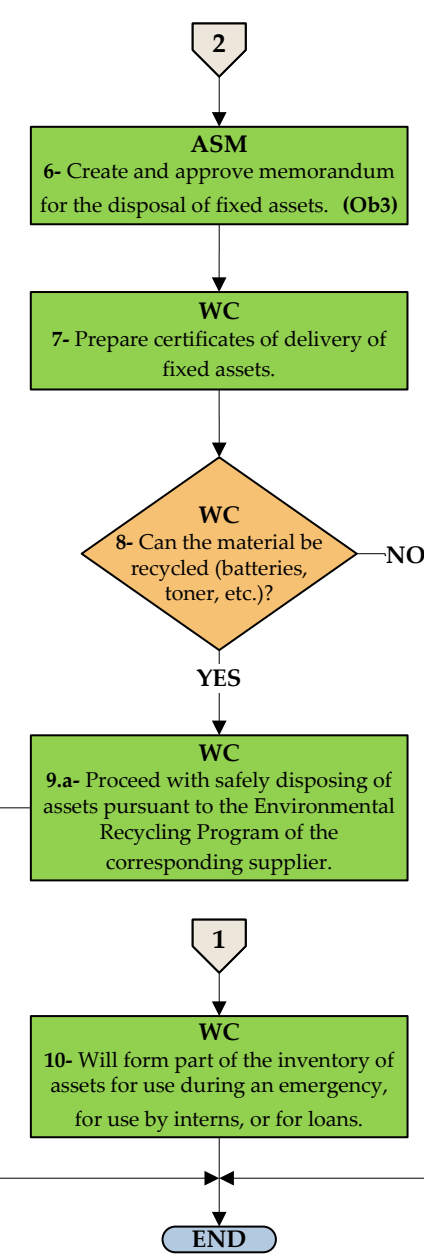
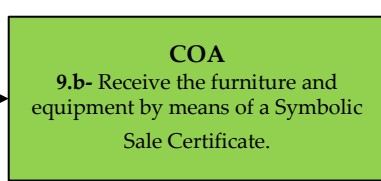
**Subprocess**

**12.2.4 Disposal of fixed assets.**

<b>Objective</b>	Dispose of any fixed assets that have become deteriorated, are no longer in use, have become obsolete, or whose warranty has expired, and proceed with selling or donating them. Update the inventory accordingly.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>Fixed assets that are properly identified and included in the warehouse's IT system.</li> <li>Requests for the disposal of fixed assets that were delivered to users or are stored in the warehouse.</li> </ul>	<ul style="list-style-type: none"> <li>Annual Budget Plan</li> <li>Procedures Manual for the Procurement of Goods and Services</li> <li>Annual Action Plan (AAP)</li> <li>Internal regulations</li> <li>Those defined by the process support systems</li> </ul>
<b>Products</b>	Updated record that allows for keeping track of fixed assets that have been disposed of at IICA Headquarters.	

## 12.2 Management of Assets and Supplies.

### 12.2.4 Disposal of fixed assets.

INVOLVED	<b>Administrative Services Division (ASM)</b> <b>Main Warehouse (MW)</b> <b>Information/Communication Technologies and Digital Agriculture Division (ICT-DA)</b> <b>Community Outreach Association (COA)</b>			
	Administrative Services Management	Information/Communication Technologies and Digital Agriculture Division	Community Outreach Association	Comments
				<p><b>Ob1:</b> IT and multifunctional equipment are subject to a systematic renovation process defined by ICT-DA, whereby products are disposed of because their warranty has expired or they have become obsolete, deteriorated or damaged).</p> <p>The person responsible for the deteriorated or disused fixed assets must complete the "Transfer of Assets" form via the GED, before the asset is delivered to the Warehouse.</p> <p><b>Ob2:</b> If it does not meet the established criteria, the ICT-DA will inform the Main Warehouse that the IT equipment cannot be disposed of.</p>
				<p><b>Ob3:</b> To this end, compliance with Rule 4.17 of the Financial Rules "Procedure for disposing of assets" and Memorandum SC/DG-251 dated 23 April 2020 is mandatory.</p> <p>The Directorate of Corporate Services, the Internal Audit Unit and the Financial Management Division are informed; distributed internally within the ASM.</p>

**Process**

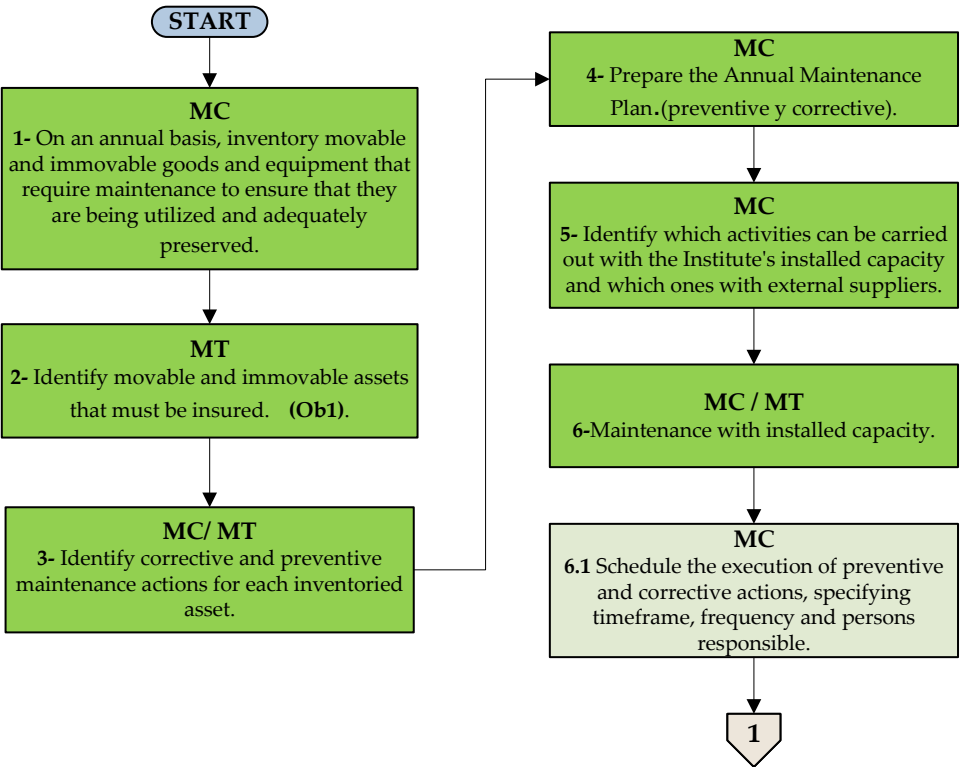
**12.3 Maintenance and Safekeeping of Infrastructure and Non-Computer Equipment.**

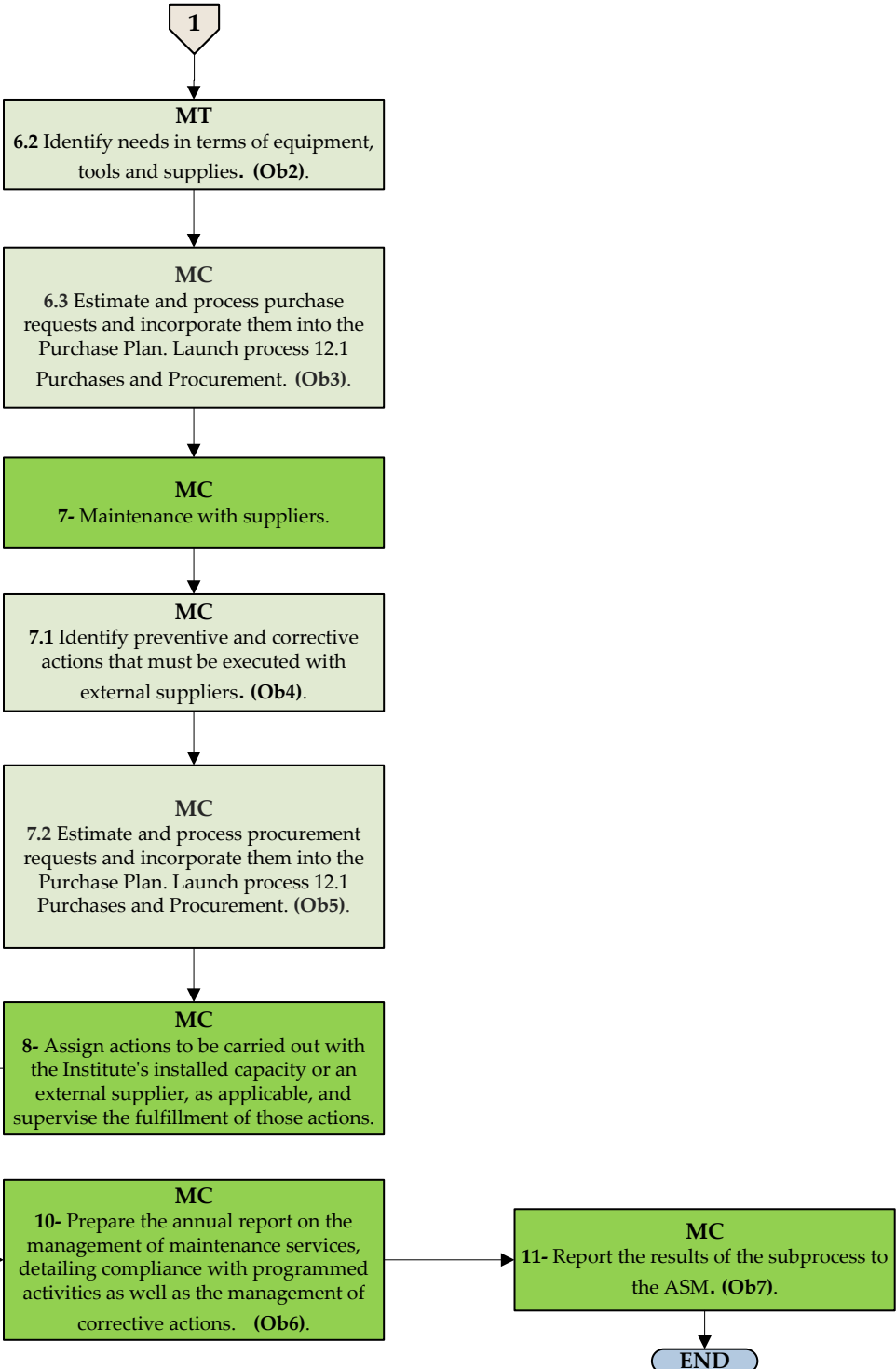
<b>Objective</b>	Ensure that movable and immovable goods, as well as non-computer equipment, remain in excellent condition and continue to operate adequately, enabling IICA to support its staff members through the availability of required assets.
<b>Scope</b>	Local level. Technical-regulatory actions at the hemispheric level. Centralization at strategic levels and at Headquarters. Decentralization at the tactical and operational levels by region and country.
<b>Specific policies and rules</b>	1. The Administrative Services Division must generate an annual preventive and corrective maintenance plan for all of the immovable goods and non-computer equipment at IICA Headquarters and the Delegation in Costa Rica. 2. This process includes tasks and procedures related to the safety and physical upkeep of the facilities at IICA Headquarters and the Delegation in Costa Rica.
<b>Information Systems</b>	SAP - FONT - Office - EMAIL - SIG
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• Percentage fulfillment of the maintenance plan versus the scheduled maintenance plan.</li> <li>• Percentage availability of critical services (water, electricity, air conditioning, safety systems) versus the measured work time must equal 100%.</li> <li>• Percentage of safety incidents effectively addressed must equal 100%.</li> </ul>

	<b>Background Information</b>	<b>Reference Material</b>
<b>Inputs</b>	<ul style="list-style-type: none"> <li>• Inventory of movable and immovable goods, as well as non-computer equipment.</li> <li>• Annual Maintenance Plan.</li> </ul>	<ul style="list-style-type: none"> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Internal regulations.</li> <li>• Financial Rules.</li> <li>• Annual Action Plan (AAP).</li> <li>• Drawing of premises / Equipment manuals.</li> <li>• Those defined by the process support systems.</li> <li>• Contracts for outsourced maintenance and safety services.</li> </ul>
<b>Products</b>	Facilities and assets effectively safeguarded and preserved.	

**12.3 Maintenance and Safekeeping of Infrastructure and Non-Computer Equipment.**

**INVOLVED**  
Maintenance Coordinator (MC)  
Maintenance Technician (MT)  
Installed Capacity (IC)  
External Suppliers (ES)

External Suppliers	Administrative Services Management	Comments
		<p><b>Ob1:</b> This monitoring process must be carried out at least twice a year, to ensure that all assets are covered by adequate policies. <b>Go to Insurance Process (diagramming pending)</b></p>

External Suppliers	Administrative Services Management	Comment
		<p><b>Ob2:</b> This includes uniforms, accessories, communication equipment, weapons, etc.</p> <p><b>Ob3:</b> The launch of the Purchases and Procurement process will not interrupt the execution of this subprocess.</p> <p><b>Ob4:</b> Realistic timeframes for executing these actions must be defined, taking into account the amount of time required to conduct the corresponding contracting processes.</p> <p><b>Ob5:</b> The launch of the Purchases and Procurement process will not interrupt the execution of this subprocess.</p> <p><b>Ob6:</b> This report will provide feedback for the subprocess. Estimates for the following period will be adjusted based on this feedback.</p> <p><b>Ob7:</b> The ASM may supervise the execution of this subprocess when deemed necessary.</p>

## Process

### 12.4 Management of Internal Services.

<b>Objective</b>	To provide IICA staff members with non-technological services of the highest quality and at a favorable cost, fostering adequate conditions to enable them to fulfill their responsibilities towards the Institute.
<b>Scope</b>	Hemispheric level. Technical-regulatory actions at the country level. Centralization at strategic levels and at Headquarters. Decentralization at the tactical and operational levels by region and country.
<b>Specific policies and rules</b>	Each Delegation has its own internal procedures for the provision of services.
<b>Information Systems</b>	SAP – Office - Email and service-specific applications – SIG/GED
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• Percentage of requests addressed on time (as established for each service) versus requests received.</li> <li>• 90% rating (excellent) is satisfaction surveys.</li> </ul>

Process	Subprocess
12.4 Management of Internal Services.	12.4.1 Management of IICA Shop.
	12.4.2 Provision of Internal Services.
	12.4.3 12.4.3 Operational management of insurance (vehicles, movable and immovable property and others).





**Subprocess**

**12.4.1 Management of IICA Shop.**

<b>Objective</b>	Provide innovative, high-quality and appealing items that promote IICA, at an affordable price.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Current inventory of IICA Shop products.</li> <li>• Requests for products from IICA Shop.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Procedures Manual for the Procurement of Goods and Services.(Version 2021)</li> <li>• Annual Action Plan (AAP).</li> <li>• Internal regulations.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	Provision of products sold by IICA Shop.	

## 12.4 Management of Internal Services.

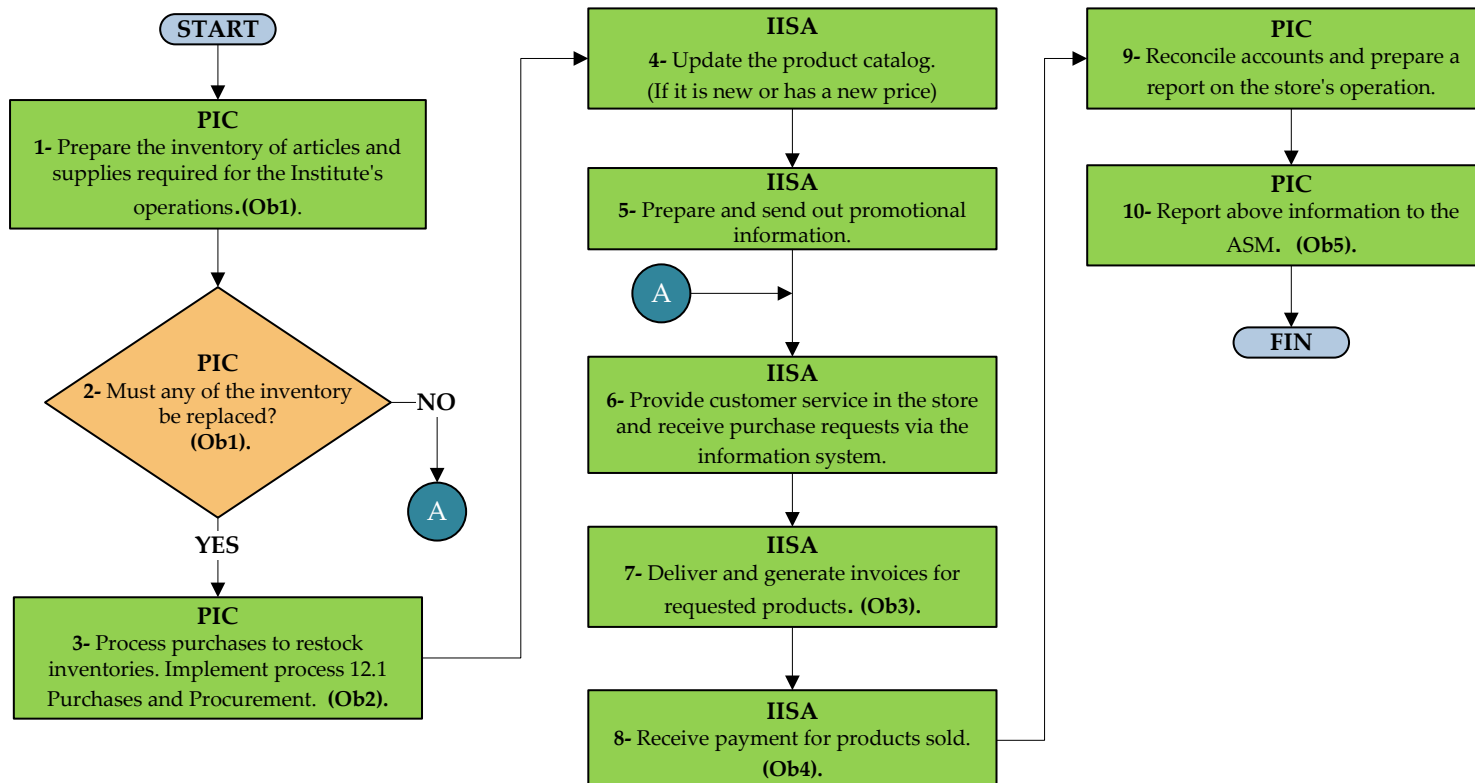
### 12.4.1 Management of IICA Shop.

**INVOLVED**

**Procurement and Information Coordinator (PIC)**  
**Information and Internal Services Assistant (IISA)**  
**Inventory and Warehouse Assistant (IWA)**

#### Administrative Services Management

#### Comments



**Ob1:** The inventory is set up based on market trends.

**Ob2:** Received at the warehouse by IWA.

**Ob3:** Can be delivered at the store (Headquarters) or via the courier service.

**Ob4:** IICA Shop accepts:

- Cash
- Direct payments using a dataphone.
- Payments covered by budget allocations, through internal requests.
- Payments through payroll deduction.

**Ob5:** Management may supervise the execution of this subprocess when deemed necessary.

**Subprocess**

**12.4.2 Provision of Internal Services.**

<b>Objective</b>	Provide staff members at IICA Headquarters and the Delegation in Costa Rica with non-technological services of the highest quality and at a favorable cost.	
<b>Inputs</b>	<b>Background Information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>Request for the provision of non-IT support services (transportation, courier, printing, etc.).</li> </ul>	<ul style="list-style-type: none"> <li>Annual Budget Plan.</li> <li>Procedures Manual for the Procurement of Goods and Services.</li> <li>Annual Action Plan (AAP).</li> <li>Internal regulations.</li> <li>Those defined by the process support systems.</li> </ul>
<b>Products</b>	Internal services provided to the full satisfaction of the internal client.	

## 12.4 Management of Internal Services.

### 12.4.2 Provision of Internal Services.

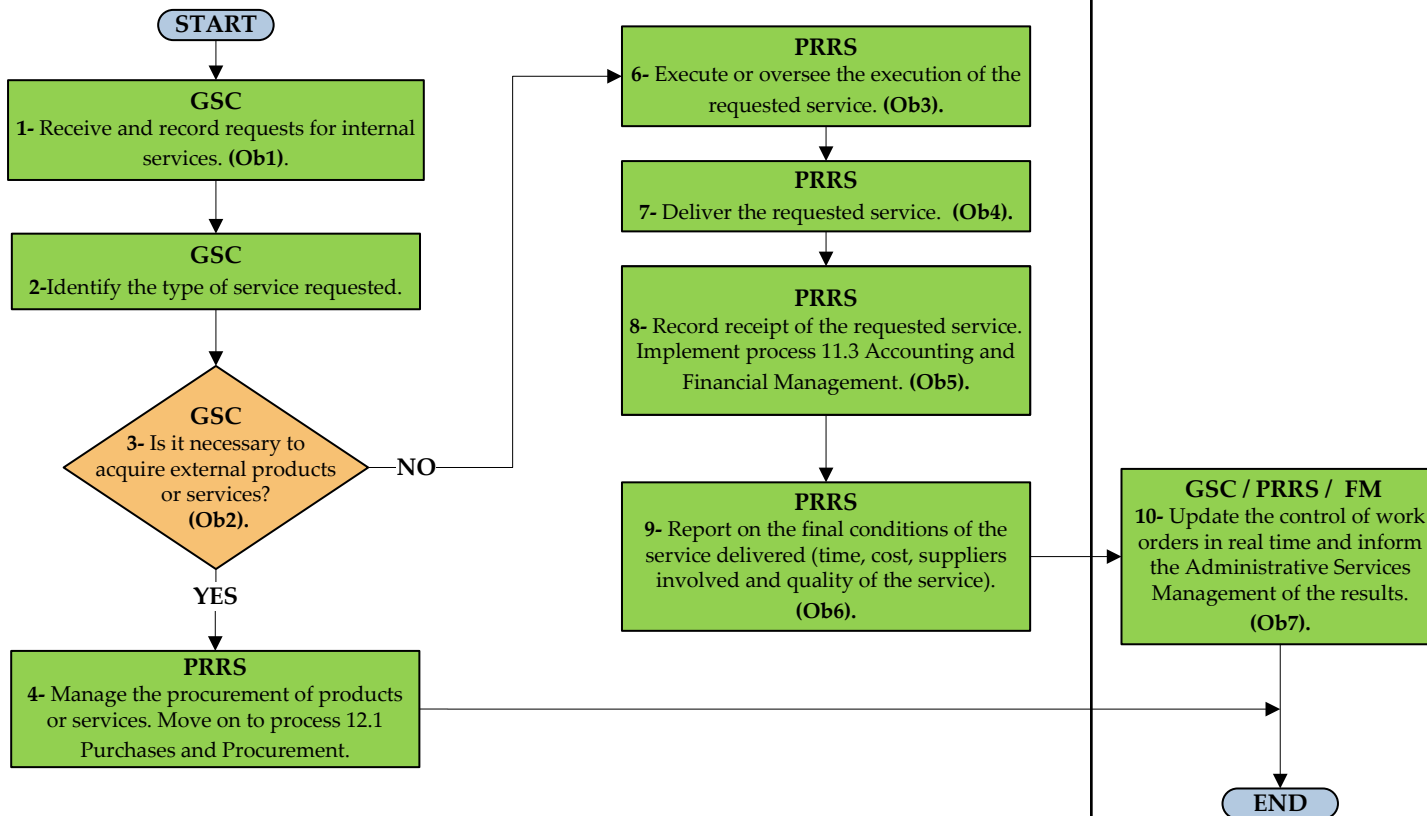
**INVOLVED**

**General Services Coordinator (GSC)**  
**Person Responsible for Requested Service (PRRS)**  
**Financial Manager (FM)**

#### Administrative Services Management

#### Mixed

#### Comments



**Ob1:** Received through the system (to be developed). Only requests for services that add value to IICA will be accepted.

Includes transportation, courier, printing, phone and other services, and estimated timeframes for delivery.

**Ob2:** Determined based on the procedure for the requested service.

**Ob3:** The corresponding regulations will be applied, based on the type and description of each specific service.

**Ob4:** Service levels, timeframes for delivery, etc. will be defined for each service.

**Ob5:** The Administrative Services Division will cover the cost of these services with a budget line item of its own. (INTERUNITS).

**Ob6:** Will provide feedback for any future needs in this area.

**Ob7:** The ASM may supervise the execution of this subprocess when deemed necessary, and will report to Financial Management as necessary.



**Subprocess**

**12.4.3 Operational management of insurance (vehicles, movable and immovable property and others).**

<b>Objective</b>	Secure coverage for IICA's insurable real and personal property and offer its staff favorably priced options for motor vehicle insurance that are in line with current regulations and that are delivered with high standards of service.	
<b>Inputs</b>	<b>Background information</b>	<b>Reference Material</b>
	<ul style="list-style-type: none"> <li>• Inventory of insurable movable and immovable property and equipment.</li> <li>• Insurance policies for movable and immovable property in force.</li> <li>• Terms of reference for negotiating or renewing insurance policies for vehicles and/or movable and immovable property and equipment.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual Budget Plan.</li> <li>• Procedures Manual for the Procurement of Goods and Services.</li> <li>• Annual Action Plan (AAP).</li> <li>• Internal regulations.</li> <li>• Specific procedures defined for each type of service.</li> <li>• Outsourced insurance contracts and maintenance services.</li> <li>• List of staff members.</li> <li>• Those defined by the process support systems.</li> </ul>
<b>Products</b>	<ul style="list-style-type: none"> <li>• Efficient and effective coverage of vehicles, as well as real and personal property of the Institute.</li> <li>• Options for motor vehicle insurance offered to staff, in keeping with established rules and delivered with high standards of service.</li> </ul>	

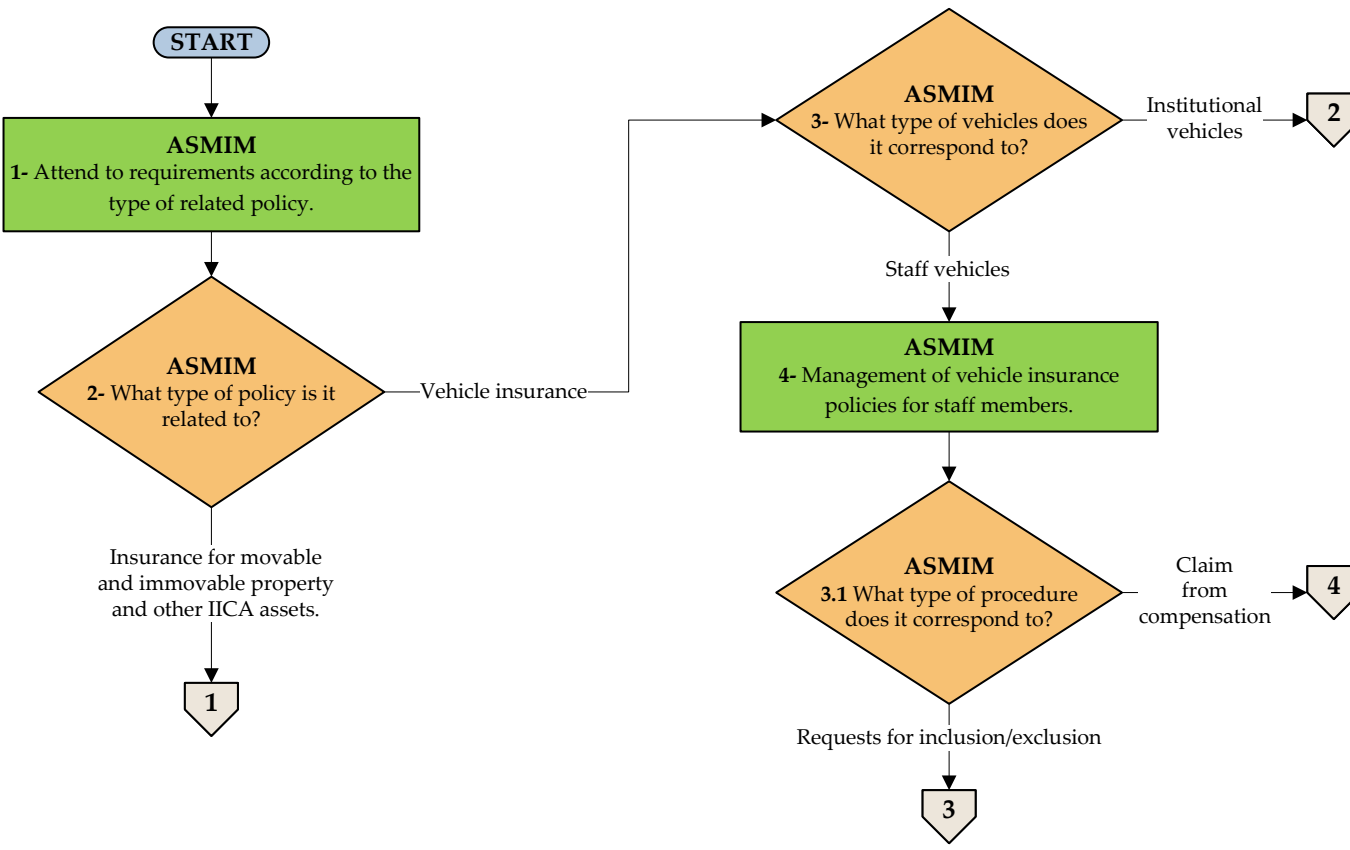
**12.4 Management of internal services.**

**12.4.3 Operational management of insurance (vehicles, movable and immovable property and others).**

**INVOLVED**  
**Corporate Services Management ( CSM )**  
**Administrative Services Manager ( ASM )**  
**Administrative Services Management Insurance Manager ( ASMIM )**  
**Responsible for Insurance Company ( RIC )**  
**Human Talent Manager ( HTM )**  
**Financial Manager ( FM )**

**Administrative Service Management**

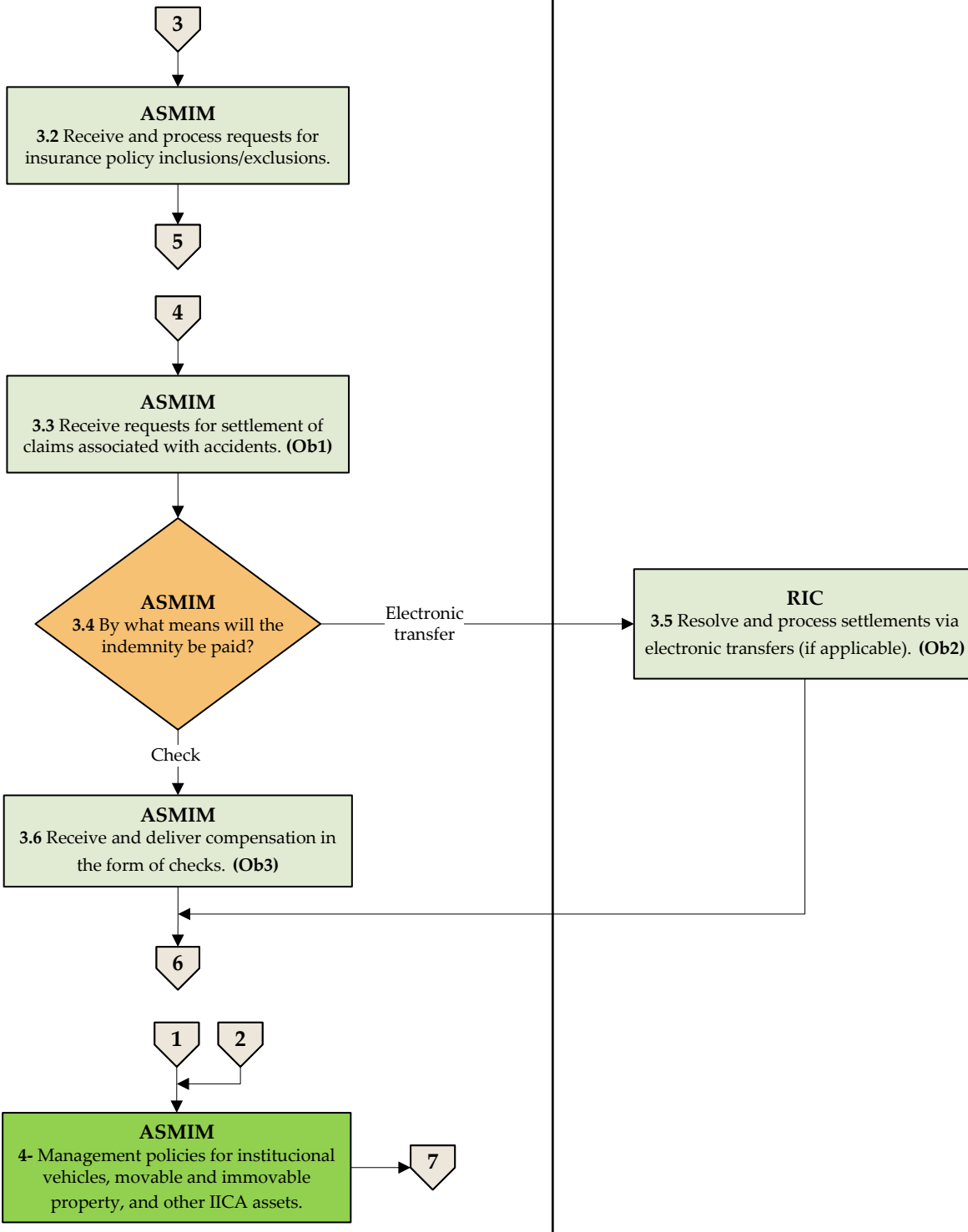
**Comments**



**Administrative Service Management**

**Insurance Company**

**Comments**



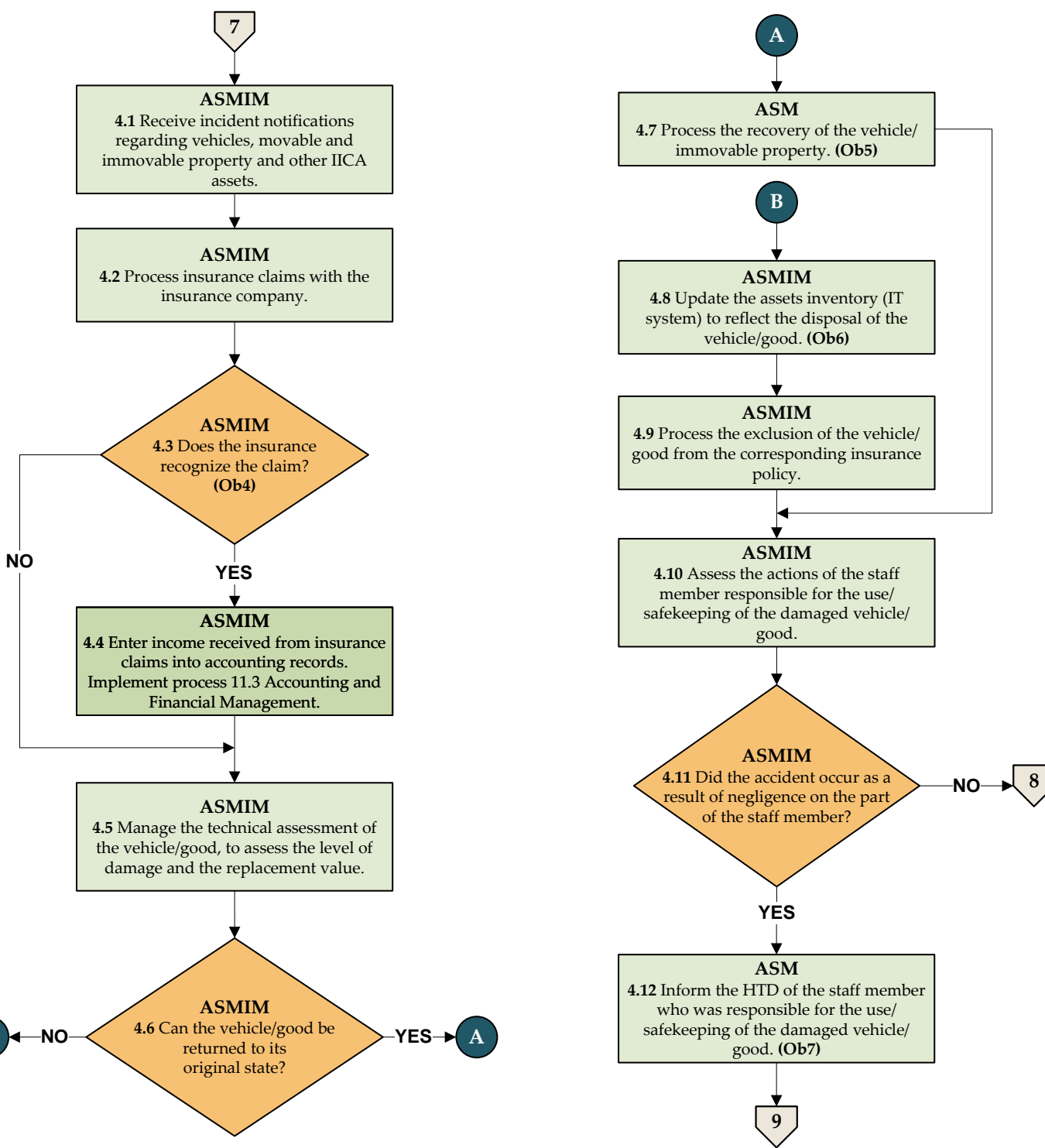
**Ob1:** In countries where there is a local fronting, the insured party shall conduct the transaction directly with the insuring company and in cases where there is no fronting, the information should be sent to the ASD to process the claim with the insurance broker.

**Ob2:** This activity will be carried out on the banking platforms available locally, in each country in which a insurer delegation is located. In the case of countries with no local delegation, this activity will be carried out in the central offices of the corresponding insurance company.

**Ob3:** This activity is only carried out as an exception.

**Administrative Service Management**

**Comments**



**Ob4:** Compensation will be received via an electronic transfer.

**Ob5:** If the insurance policy does not provide coverage and the vehicle/good must be recovered with institutional funds, purchase processes may be implemented.

**Ob6:** The vehicle/good may be sold to institutions that may be interested in purchasing it despite its condition.

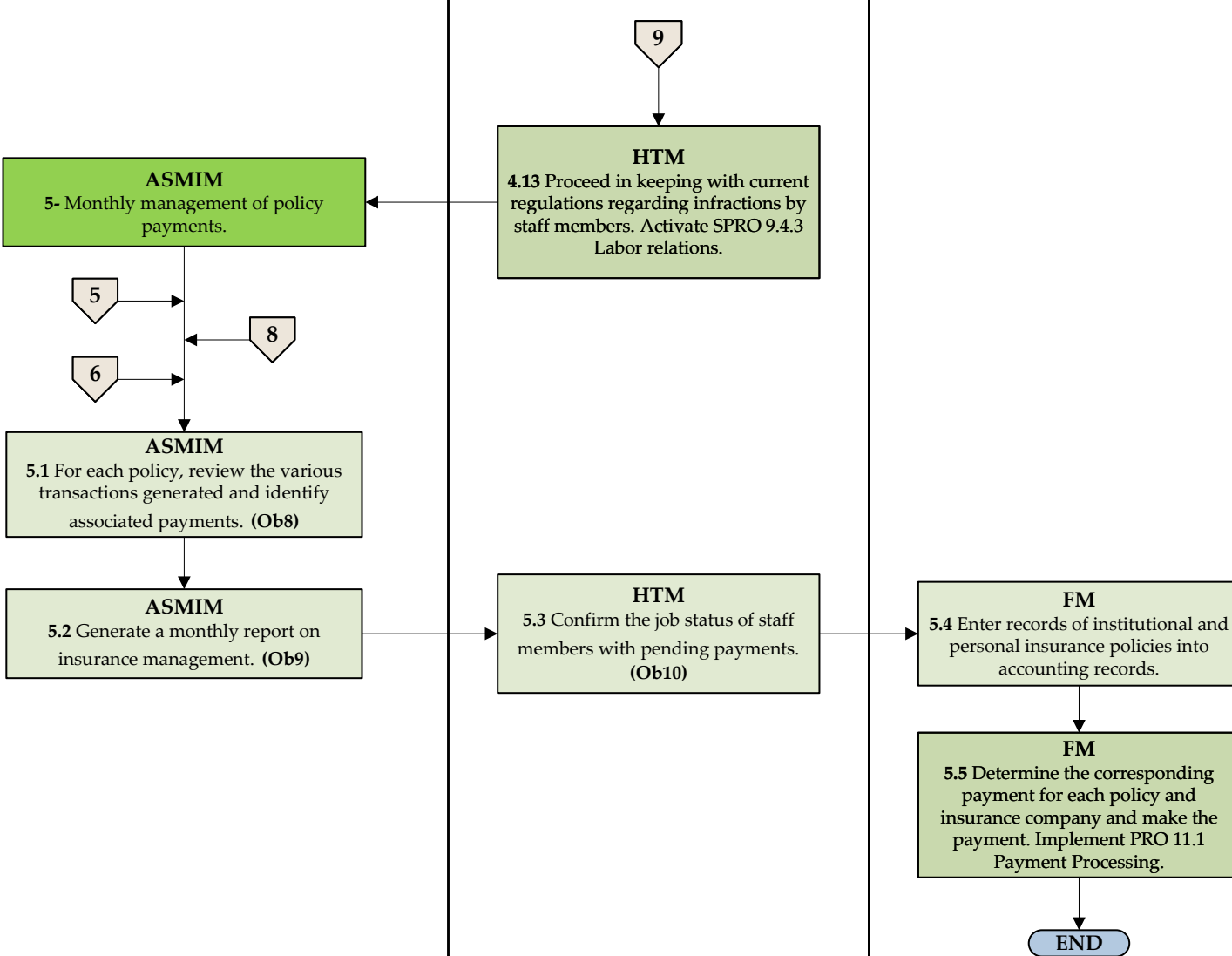
**Ob7:** The Division will be informed of the results of the technical assessment of the damages and of the insurance claim submitted to the corresponding company.

**Administrative Service Management**

**Human Talent Division**

**Financial Management Division**

**Comments**



**Ob8:** - Vehicle policies: Account statement for each insured vehicle (current and former staff members) and pending payments.  
- Institutional insurance policies: pending payments resulting from negotiations.

**Ob9:** A copy should be sent to the Financial Management Division, to serve as input for their processes.

**Ob10:** A staff member whose employment at the Institute will be terminated, must implement specific actions to ensure that pending payments are cancelled.