

Acquisition Guidelines - the Research Authority - December 2022

Prior to submitting research grant proposals

1. The researcher must **inform the Research Authority in advance** about any intention to submit proposals for a call for papers and receive guidance/consultation where necessary while taking note of the last date for registration and the last date for submissions.
2. The researcher must **send a copy of the submitted proposal to the Research Authority.**
3. The researcher must get permission **beforehand and in writing from the finance department/accountant** Adina Pink regarding the proposed budget as part of the proposal's submission.
4. The researcher must send a copy of the approval and the budgetary outline to the abovementioned Research Authority.

In principle, the submitted monetary proposal serves as the budget for the grant's whole lifetime, subject to the foundation financing it

Opening a budget after winning the grant

1. **In accordance with the grant winning letter and the signing of the final agreement** between the foundation and the institute or between the institute and the main submitter (when the institute is the "secondary submitter" in the proposal), **a budgetary portfolio will be opened** (hereafter: the main classification code) by the finance department; this will be done in coordination with the researcher and with their permission **in principle** in regard to the budgetary articles.
2. **In any budgetary request/appeal** - the researcher must note the main classification code/assignment number.
3. **The budgetary portfolio** will embody the submitted financial proposal and the budgetary articles (e.g., scholarships, hourly salary, equipment, materials, and overhead).
4. **Budgetary articles:** each article (as specified above) has an internal institute code that is used by the finance department to divide the proposal into its various components.
5. **When the budgetary articles need to be "mobilized/classified" (hereafter: moving sums/balances between budgets)**, be it after winning the grant or throughout the project's lifetime, it will be done in coordination with and with the prior approval of the finance



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department / accountant Adina Pink and in accordance with the conditions of the call for papers / signed agreement.

The researcher must keep up to date with the Research Authority at any point and before each planned financial expense regarding the grant's updated budget balance

Acquisition management - in practice

1. **Acquisition inquiry** - each request for any monetary expense that comes from the grant's budget **requires an inquiry into the budgetary balance and prior approval from the finance department.**
2. **Purchase requisition request** - to produce a purchase requisition, the researcher must ask, via the Research Authority, for a budgetary approval from the finance department / Adina.
The request must be accompanied by a price proposal from the requested supplier, with the following exceptions:
 - ❖ If the price proposal is between 3,001₪ - 30,000₪ - **2 price quotations must be attached**
 - ❖ If the price proposal is between 30,001₪ - 100,000₪ - **3 price quotations must be attached**
 - ❖ If the price proposal is over 100,000₪ - **a tender must take place**
 - ❖ If the **acquisition** is of **computation equipment**, one should turn to Gal Steinhart to receive a price proposal from suppliers with which the institute has a collaboration agreement.
 - ❖ If the **purchase requisition - supplier abroad**, the research must take into consideration the following associated elements:
 - Customs brokerage - 100\$ on average.
 - Shipment - depends on the package's size and country of origin.
 - 17% valued added tax.
3. **New suppliers:**
 - ❖ If it is a **new Israeli supplier**, their information should be attached according to appendix 3.1a;
 - ❖ If it is a **new supplier abroad**, their information should be attached according to appendix 3.1b.

4. **Producing a purchase requisition** - the Research Authority takes care of producing a purchase requisition as well as the following:
 - a. The approved price proposal;
 - b. The finance department's budgetary approval;
 - c. Additional relevant documents.
5. **Approving the purchase requisition** - after producing the purchase requisition in the One system, the acquisition department takes care of checking the proposal's intactness and managing the round of approvals, subject to the institute's authorized signers and according to the acquisition's size.
6. **Producing a purchase order (PO)** - subject to the completion of the round of purchase requisition approvals (article 5), the acquisition department takes care of producing a purchase order, which serves as the financial expense's formal reference for the institute.
7. **PO** - the purchase order is forwarded to the supplier by the acquisition department, and a copy is given to the researcher and the Research Authority.

Invoices and payments

Refunds/purchase requisitions will not be approved if the foundation has no budget leftover, and the acquisition of a product/labor/service has occurred with no prior authorization

8. **Invoice** - an invoice must be produced by the supplier subject to the equipment/services being supplied to the researcher.
9. **Invoice approval** - the invoice, together with the purchase requisition, is forwarded to the researcher for payment confirmation.
10. **Payment** - in accordance with the researcher's confirmation (article 9), the invoice is forwarded to the finance department by the acquisition department for payment; the payment is conducted according to the institute's accounting terms (EOM+ 45).

A copy of all the acquisition documents, including the price proposal, the budgetary approval, the purchase requisition, the purchase order, the invoice, and other relevant documents - will be filed in the research / Research Authority portfolio

Appendix 3.1a - New Israeli Supplier

To open a new Israeli supplier account in the system, the following information must be sent:

- ❖ The supplier's name
- ❖ Business number / licensed dealer number
- ❖ Address
- ❖ Phone number
- ❖ E-mail

Bank information:

- ❖ Bank
- ❖ Branch
- ❖ Account number

Ownership certificate or a check photo should be attached.

If the supplier is VAT exempt, the VAT exemption certificate must be attached.

HIT's accounting terms - EOM+ 45.

Appendix 3.1b - New Supplier Abroad

To open a new supplier abroad account in the system, the following information should be sent:

- ❖ Name of company
- ❖ Address
- ❖ City
- ❖ State
- ❖ Contact person
- ❖ E-mail
- ❖ Phone

- ❖ Company number

- ❖ Bank details including bank address, SWIFT, or BIC