Position Classification Standard for Purchasing Series, GS-1105

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SERIES DEFINITION

This series includes positions that involve supervising or performing work to acquire supplies, services, and construction by purchase, rental, or lease through (a) delivery orders and/or (b) small purchase procedures. The work requires knowledge of policies and procedures for delivery orders and small purchases. This work also requires knowledge of commercial supply sources and common business practices related to sales, prices, discounts, units of measurement, deliveries, stocks, and shipments.

This standard supersedes the standard for the Purchasing Series, GS-1105, dated February 1969, TS-78.

EXCLUSIONS

1. Classify to the Supply Clerical and Technician Series, GS-2005, positions that involve obtaining supplies, services, or equipment exclusively through orders against stockrooms, depots, warehouses, and supply centers within the same agency or in other Governmental departments, i.e., not from vendors, when the primary knowledge requirement is of supply systems, operations, and regulations.

2. Classify work that involves using sealed bidding or negotiation procedures to acquire supplies, services, or construction in amounts exceeding the small purchase threshold to the Contracting Series, GS-1102. Some organizations combine purchasing with contracting. Classify these positions by applying the principles for classifying mixed series/grade positions. For additional information regarding the differences between the GS-1102 and GS-1105 series, see the standard for the Contracting Series, GS-1102.

3. Classify to the Realty Series, GS-1170, positions that involve acquiring real estate or space by lease, purchase, rental, exchange, or donation, when the primary knowledge requirement is of real estate principles, practices, markets, and values.

4. Classify to the Agricultural Marketing Series, GS-1146, positions that involve acquiring agricultural commodities to provide price support to producers, when the primary knowledge requirement is of agricultural marketing functions and practices.

5. Classify to the Procurement Clerical and Technician Series, GS-1106, positions that involve supporting procurement programs, but do not involve actually buying or arranging to buy goods. Such work requires a practical knowledge of procurement procedures, operations, and regulations. Some positions include a combination of purchasing and procurement support work. Classify these positions by applying the principles for classifying mixed series/grade positions.
OCCUPATIONAL INFORMATION

Distinguishing Between Purchasing and Contracting Work

For the purpose of position classification, the key differences between purchasing and contracting work are (1) dollar value, and (2) procedures and instruments.

Contracting specialists acquire goods and services in amounts exceeding the small purchase threshold. They normally use sealed bidding or formal negotiation methods, such as invitations for bid (IFB) or requests for proposal (RFP). They award bilateral contracts, i.e., contracts signed by both parties.

Purchasing agents normally solicit quotes, rather than proposals, orally or through written requests for quotations (RFQ). Some purchasing agents use RFP's for small purchases when a firm offer is required or when technical factors, rather than price, are the primary consideration. Purchasing agents generally use unilateral instruments to establish contracts, i.e., purchase orders, calls against blanket purchase agreements, and credit card purchases. Some purchasing agents use bilateral purchase orders to make purchases within small purchase dollar limitations. Purchasing agents also issue delivery orders (that may exceed the small purchase threshold) against established contracts or with certain Government sources of supply.

Contracting work also differs from purchasing work in the nature and level of knowledge required. Contracting specialists typically must comply with or administer many detailed, complex statutory and regulatory requirements that apply rarely or never to small purchases and delivery orders. Contracting work usually involves nonrepetitive or more sophisticated requirements, more complex regulations and reviews, extensive cost/price analysis, complex negotiations over long contractual periods, and high level impact on industry.

For additional information regarding the differences between the two series, see the standard for the Contracting Series, GS-1102. For additional information about delivery orders and small purchase procedures, see applicable parts of the Federal Acquisition Regulations.

Overview of Purchasing Process

Purchasing agents use a variety of purchasing procedures to acquire supplies, services, and construction. In this standard, "purchasing" refers to (a) open market procedures used to purchase requirements within small purchase dollar limitations, and/or (b) procedures used to place delivery orders against established contracts, such as Federal Supply Schedules and requirements contracts. For the purpose of position classification, the terms "open market" and "small purchase" are used interchangeably.

Purchasing work is governed by acquisition laws and regulations, such as the Federal Property and Administrative Services Act (FPASA) and the Federal Acquisition Regulations (FAR). These are supplemented by additional regulations, legal precedents, and agency policies and procedures.
Purchasing agents acquire supplies and services to meet the needs of agencies or activities. These needs include common supplies available off-the-shelf, items that are manufactured to order, specialized services, or construction. Purchasing agents determine the appropriate procedures to use to obtain goods and services that will fill the requirements, meet the delivery schedule, provide the best price, and conform to acquisition regulations. Purchases made usually involve short performance periods (less than a year). Suppliers may be local or nonlocal retailers, distributors, wholesalers, or manufacturers. During the purchasing process the purchasing agent remains in contact with the ordering office and/or with technical and supply personnel to discuss quotes that differ from the original order. Differences may involve substitution of items, delay in delivery dates, or increases in price.

Purchasing agents keep informed of available goods and services by checking commercial catalogs, contact files, and listings of firms offering particular goods, and through informal contacts with sales representatives, suppliers, and buyers from other Federal activities. They are expected to have sufficient knowledge of the market to advise requisitioners on products available, sources, prices, and vendor reputation.

Steps in the Purchasing Process

The basic purpose of a purchasing office is to provide support to customers by obtaining the goods and services requested. Customers or others are responsible for determining what is needed, i.e., the requirements. Purchasing agents determine how the requirement will be purchased and advise customers on the status of the purchase.

Purchasing agents typically act upon many purchase requests each day. The requests usually include detailed descriptive information, such as the item name, part number, detailed specifications, latest known price, and a suggested vendor. Service and construction requests often include a statement of work.

Using Federal and agency guidelines, the purchasing agent first screens the purchase request for completeness and adequacy and to determine how the purchase should be made. Some factors considered are--

- does the purchase request contain certification of funds, prior authorizations or approvals, required justifications, or other documentation;
- can separate purchase requests be consolidated;
- what labor laws or other social legislation apply;
- is there a required source (e.g., Federal Supply Schedule) for the supply or service;
- what is the dollar value of the requested goods;
- is competition available or required;
- is the item or service commercial or specialized;

- what is the best way to locate sources; and

- how urgent is the requirement.

The purchasing agent determines whether to meet the requirement by either ordering against an existing contract (e.g., Federal Supply Schedules) or through open market/small purchase procedures. If the decision is to order against an established contract, the purchasing agent prepares a delivery order, or orders orally or by written telecommunication. If the decision is to use an open market procedure, the purchasing agent then determines--

- the extent of competition;

- the specific firm or firms to whom the work will be offered;

- the method of solicitation (e.g., orally or by means of a written RFQ);

- the method of purchasing (e.g., calls against a blanket purchase agreement, issuance of a purchase order, over-the-counter imprest fund or credit card transaction, etc.); and

- the terms and conditions of the purchase.

Before making a purchase, the purchasing agent evaluates responsiveness of the quotes and vendor responsibility, reviews quotes for price reasonableness, and determines if the requirements for competition have been met. For service or construction purchases, the purchasing agent may have to arrange for and attend technical review committees, pre-award conferences and walk-throughs, and serve as the employing organization's business representative during these sessions.

Note: Orders placed under established contracts, such as Federal Supply Schedules (FSS), may not require solicitation of sources, selection of clauses or provisions, determinations of price reasonableness, or vendor responsiveness and responsibility. For these orders, specific terms and conditions usually have been established and agreed upon between the Government and the vendor(s) involved.

Some supply, service, or construction orders also require substantial responsibility for administration and oversight. This may include responsibility for representing the employing organization in post award meetings or discussions with contractors to obtain agreement on significant or ongoing changes in small purchases, encourage contractor compliance, or terminate the order. More typical, however, is post award administration involving delays in delivery and minor non-conformance in quantity or product. This usually results in the purchasing agent acting as a liaison between the vendor and the using party to negotiate minor price considerations, changes in terms of delivery, cancellations of orders, etc.
Sources of Supply (Required and Open Market)

Before using open market procedures, purchasing agents must consider required sources of supply. Required sources include both Government sources of supply and established contracts. Federal Acquisition Regulations (FAR) list required sources that purchasing agents throughout the Government must consider (e.g., agency inventories, excess property lists, Workshops for the Blind and Other Severely Handicapped, Federal Prison Industries, Inc., and Federal Supply Schedules). The FAR establishes an order of priority for acquiring supplies and services from required sources. It also provides information on ordering from each source including any exemptions to the requirement for ordering from that source. Purchasing agents determine if the needed supplies or services are available from the required sources. If they are not available, or an exemption applies, purchasing agents establish contracts through open market (small purchase) procedures.

Items not on mandatory schedules can be bought on the open market either competitively or noncompetitively. Competition, that is, obtaining quotes from more than one vendor, is required when the dollar value of the order meets the dollar threshold for competition set in the FAR. On orders below that threshold, the purchasing agent decides if prices quoted are reasonable or if additional competition is needed. Normally, purchasing agents may only solicit quotations from small businesses. If no responsible small business concern submits a reasonable quotation, the purchasing agent may make the purchase on an unrestricted basis.

Sole source purchases, small purchases made on an unrestricted basis, and mandatory schedule items bought on the open market are a few examples of the kinds of purchases that require extra documentation or further justification.

Methods of Solicitation

When necessary, purchasing agents solicit quotes either orally or by issuing requests for quotation (RFQ). Quotations are not offers and do not create a binding contract. There is no contract until (1) the purchasing agent issues a purchase order or otherwise offers the work to the vendor and (2) the vendor, either in writing or through performance, agrees to the price and other terms of the purchase order.

Oral solicitation refers to telephone calls made to vendors to get quotes. This method is used typically when items are well-known in the industry or when delivery is urgent.

RFQ refers to the written document prepared by the purchasing agent that explains the item(s) desired and various terms and conditions. This method of purchase typically is used for items with detailed technical or specialized specifications. It also may be used for less complex items when feasible. For example, the purchasing agent can combine several orders for similar items on one written request. RFQ's also may be used for orders when delivery is not urgent or when the purchasing agent anticipates there will be a large variation in prices offered.
Methods of Purchase

After making a purchase decision, the purchasing agent selects and uses the appropriate method to confirm or place the order. The most commonly used methods are delivery orders, purchase orders, calls against blanket purchase agreements, imprest funds, and credit cards.

A delivery order is an order for supplies or services placed against an established contract or with Government sources of supply. Purchases made against established contracts may not exceed the maximum order limitation (dollar value or quantity) established in the contract.

A purchase order (PO) can be unilateral or bilateral, priced or unpriced. It is an offer by the Government to a vendor for the future delivery of supplies or the future performance of services or construction. In exchange, the Government promises to pay the price stated on the order if the vendor completes the delivery or performance. An unpriced PO is used when it is impractical to get a price before issuing the order (e.g., repairs to equipment requiring disassembly to determine the nature and extent of repairs). Most PO's are unilateral, i.e., they are considered an offer to contract that might or might not be accepted by the vendor. Usually the vendor does not sign the PO but rather signifies acceptance by performing the specified work. Purchase orders are used for open market purchases. They cannot exceed the small purchase dollar limitation.

A blanket purchase agreement (BPA) is a simple method of filling anticipated repetitive needs for supplies or services by setting up "charge accounts" with vendors. BPA terms and conditions are negotiated and agreed to in advance by the agency or activity and the vendor(s). Once issued, the purchasing agent can make frequent purchases, usually orally, and receive one monthly bill for all supplies or services bought. This technique typically is used as an alternative to writing administratively costly purchase orders. BPA's can be used both for making small purchases and ordering against Federal Supply Schedules. Purchasing agents may establish these agreements or place orders against them.

Imprest funds and Government-issued credit cards are authorized primarily for low dollar over-the-counter purchases.

Organization of Purchasing Work

Purchasing agents work in a variety of organizational settings. For example, purchasing agents may be responsible for the entire purchasing process including post award administration, or they may place orders that others administer. Some purchasing offices provide total activity/base support; some purchase specific commodities (e.g., office furniture, personal computers, or commercial services); still others service a particular geographic area. In some locations, such as a remote facility, purchasing work is performed by one person rather than by a team.

Characteristics of Articles Purchased

Articles purchased can be described either as commercial supplies, specialized supplies, or services and construction.
Commercial supplies are products that are sold to the general public in the course of normal business operations at catalog or market prices. Some commercial supplies are brand name products that are broadly advertised, well-described, off-the-shelf or otherwise readily obtainable from many sources within the local area. Examples of these kinds of commercial supplies include common medical supplies and pharmaceuticals, common hardware, and office supplies and machines. Other commercial supplies are described in industry terminology, sold in their respective industries, stocked by specialized distribution, and are available from local or nonlocal sources. These include, for example, items such as industrial-size dishwashing machines, ovens, refrigerators, and medical, scientific, engineering, or computer supplies or equipment (e.g., pipettes, filters, chemicals, chromatographs, drilling equipment, and personal computer equipment packages).

Specialized supplies are commercial products that have been modified or altered in some way to meet Government specifications. These products typically are made-to-order, accompanied by detailed specifications or purchase requests, and available from a limited number of potential suppliers. Specialized supplies include, for example, special machine parts, modified medical or scientific equipment, and special-purpose test equipment. Some specialized supplies are similar to commercial supplies because they are also well-stocked and can be purchased off-the-shelf.

Service and construction products can be characterized as commercial or specialized. Commercial service and commercial construction products typically are described in industry terminology, are well-advertised, and are available from many local suppliers. Commercial services include most custodial and maintenance work, equipment repairs, packing and crating, cleaning, and laundry. This also may include off-the-shelf training courses or seminars. Commercial construction projects include routine repairs and alterations, such as installing doors or windows. Specialized services or construction products typically are described in formal Government specifications or detailed purchase descriptions and are available from a limited number of potential suppliers. Specialized services include scientific or medical studies and testing. Specialized construction projects include engineering design studies and alterations and repairs to roads and buildings.

Within each of the three categories--commercial supplies, specialized supplies, and services and construction--small purchases may vary in complexity depending on factors such as the nature of the requirement, availability of sources, dollar value of the purchase, and previous history.

Items that are well-described and well-known generally are easier to purchase than more technical or specialized requirements. As requirements become more technical, they become more difficult to understand. This makes it more difficult for the purchasing agent to identify missing information in the purchase description, understand critical characteristics, ensure adequate description of these characteristics, locate vendors, explain requirements, and evaluate offers.

While the customer or other personnel may be responsible for actually defining critical characteristics, purchasing agents must understand the general characteristics of the required supplies or services and associated markets. Purchasing agents are expected to know, for
example, that a particular product comes in different brands, sizes, shapes, weights, and packaging, and to know how these things affect price. They need to know if interacting components and compatibility issues are involved and if there are few or many sources. This knowledge assists purchasing agents in recognizing when critical information is missing.

It also enables them to provide the information or advice that requisitioners need to make intelligent choices about desired products.

Signatory Authority

Contracting officers are individuals who have the authority to enter into and administer contracts. With respect to small purchases, this authority may not exceed the small purchase dollar threshold. With respect to delivery orders, this authority may not exceed dollar limitations established in the contract. The authority is defined in "warrants" or other instruments of delegation. The warrant typically identifies the dollar threshold and any other limits on the individual's authority. Contracting officers receive advice from specialists in engineering, supply, finance, law, or other functions. They remain, however, responsible and accountable for the purchases made, and they decide whether to confer with personnel in these other offices.

The fact that an employee has signatory authority does not, by itself, mean that the grade of the employee's position should be increased automatically. It is other factors that usually accompany signatory authority, such as increased responsibility, scope, and impact that may affect grade. The grade of a particular position, therefore, must be evaluated in terms of all of the factor levels, and must include consideration of the effect of any limits on signatory authority.

Dollar Value and Type of Deliverable

The number and complexity of regulations that apply to a small purchase are in part a function of (1) the dollar value of the purchase and (2) the type of deliverable being acquired (e.g., supply, service, or construction). For instance, competition requirements become more stringent as the dollar value increases. Also, there are unique statutory and regulatory requirements for purchasing articles such as construction, services, and computer equipment. For example, purchasing agents must request wage determinations for construction projects and services when these projects and services exceed certain dollar values set in the FAR. The construction purchase order requires the purchasing agent to monitor weekly payrolls and withhold payment if the minimum wage is not paid. The grading criteria in this standard tend to focus on the complexity of the process required to carry out and complete the assignment. References to types of deliverables in this standard are intended to illustrate or clarify factor level descriptions and are not to be construed, in and of themselves, as grade determining criteria. For more information on the above topics and small purchasing in general, see various parts in the FAR.
Impact of Automation

In some organizations, automated systems may be used to generate and prepare solicitations or purchase orders for distribution. Purchasing agents interact with these systems to perform functions such as selecting terms and conditions and evaluating prices. Other organizations have semi-automated or manual purchasing, and computers are used mostly to update, locate, check, or retrieve information.

Using an automated system, rather than a manual one, requires a different orientation to creating, acquiring, or processing information. This, however, does not exclude a position from coverage by this series when the work involves a primary knowledge of purchasing procedures, programs, and rules.

Also, use of an automated system normally does not affect the grade of a purchasing agent position. The primary influences are subject-matter knowledge of purchasing methods and techniques and skill in obtaining goods at a fair value.

TITLES

Purchasing Agent is the title for nonsupervisory positions.

Lead Purchasing Agent is the title for positions that meet the criteria contained in the General Schedule Leader Grade Evaluation Guide.

Supervisory Purchasing Agent is the title for positions that meet the criteria contained in the appropriate general schedule supervisory guide.

Agency selected parenthetical titles may be added to the above titles when further distinctions in the work are necessary for recruitment or other purposes. (See titling instructions in the Introduction to the Position Classification Standards.)

EVALUATING POSITIONS

Evaluate nonsupervisory positions using the factor level descriptions and assigned point values in this standard. For those few positions that may warrant factor levels above or below the levels provided in this standard, refer to the FES Primary Standard or other related FES standards. For more information on how to apply position classification standards that are in the Factor Evaluation System format, see information in The Classifier's Handbook and in the Introduction to the Position Classification Standards.

Evaluate work leader positions using the General Schedule Leader Grade Evaluation Guide along with the criteria in this standard.
Evaluate supervisory positions using the appropriate general schedule supervisory guide.

Since purchasing agents perform a variety of work, it is not practical to describe all work situations in factor level descriptions. When evaluating positions, credit work that is not specifically described in a factor level description if it is equivalent to and fully meets the intent of that factor level.

GRADE CONVERSION TABLE

Total points on all evaluation factors are converted to GS grade as follows:

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<th>GS Grade</th>
<th>Point Range</th>
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<tbody>
<tr>
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<td>655-850</td>
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<tr>
<td>5</td>
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</tr>
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FACTOR LEVEL DESCRIPTIONS

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

Level 1-3 -- 350 Points

The work requires knowledge of a body of standardized purchasing regulations, policies, and procedures; established commodities and markets; and common business practices to make purchases involving commercial requirements and average complexity. This includes, for example,—

- knowledge of solicitation and purchasing methods, such as oral solicitations, calls against BPA's, delivery orders, or priced purchase orders, to make (a) noncompetitive open market purchases, (b) purchases under established contracts, or (c) competitive open market purchases when specifications or statements of work are standardized, price and product characteristics are stable, and repeat vendors are used;

- knowledge of frequently used and easily understood regulations, such as those related to required sources, the use of mandatory schedules, or ordering and documentation procedures for routine purchases, to ensure regulatory compliance throughout the purchasing process;
- knowledge of basic price evaluation techniques to assess price reasonableness using well-established references, such as price lists, Government estimates, and previous history files;
- knowledge of commercial commodities and established markets to advise requisitioners of various product characteristics (e.g., available sizes, quantities, brand names, packaging, quality), identify sources of supply, and determine the appropriateness or adequacy of item descriptions;
- knowledge of basic arithmetic used in business to make simple comparisons of price, discounts, transportation costs, or similar terms;
- knowledge of post award procedures sufficient to resolve typical problems with deliverables, such as differences in price or quantity, or to recommend and prepare, for example, no-cost cancellations of purchase orders; and
- knowledge of automated or manual small purchase systems sufficient to locate, add, and retrieve information.

Illustrations:

- Purchasing agents purchase a variety of commercial supplies by placing delivery orders against established contracts. They verify completeness of item descriptions, minimum allowable purchase quantity, estimated cost, and source of supply by referring to schedules, vendor's catalogs, and history files, or through contacts with vendors. They consolidate orders to meet minimum ordering quantities under Federal Supply Schedules. They help customers define product characteristics, and explain the rules on use of mandatory supply sources and penalties for returning items.

- Purchasing agents purchase commercial supplies and services through competitive open market procedures or through orders against established contracts. They identify sources from established lists, history files, catalogs, newspaper ads, etc. They determine whether the requirement is available from a mandatory source or whether to solicit vendors on the open market. They negotiate with vendors on a limited variety of issues, such as--
  
  ! price breaks for items ordered before a sale date,
  ! accelerated delivery,
  ! reduction of service charges, and
  ! waiver of restocking fees.

For items not on mandatory schedules, they may request price lists to ensure the Government is being accorded "best customer" status. They award orders primarily based on comparing price and delivery terms. Prices quoted among competing vendors may be based on differing terms, such as different units of measurement, transportation costs, and discounts. Purchasing agents
determine the best offer and make the award through review and comparison of the different terms.

**Level 1-4 -- 550 Points**

The work requires in-depth or broad knowledge of a body of purchasing regulations, methods, procedures, and business practices to make purchases involving (1) specialized requirements and/or (2) commercial requirements that have unstable price or product characteristics, hard-to-locate sources, many critical characteristics, or similar complicating factors. This includes, for example,--

- knowledge of solicitation or purchasing methods, such as would be acquired through extended training or experience, to make competitive or sole source small purchases that involve, for example, collecting data to determine price reasonableness for new items, preparing detailed written solicitations, tailoring special terms and conditions, or other matters of similar complexity;

- skill in analyzing descriptions that have unique aspects and many critical characteristics to identify problem areas in specifications or work statements, determine if quotations are responsive, or decide if substitutions are acceptable or should be referred to other personnel for further review;

- knowledge of price analysis techniques to evaluate prices or costs for requirements with inadequate price history or evaluate allowable charges for requirements involving special cost features (e.g., per diem, lodging rates, and airfare for purchases that require on-site repair service by nonlocal vendors);

- knowledge of various acquisition clauses, such as those pertaining to inspection, acceptance, packaging, or testing to select or tailor clauses for purchases that involve special handling; and

- knowledge of post award procedures to discuss equitable price adjustments for modifications to a purchase order, determine whether to recommend termination of an accepted purchase order for convenience, or perform similar actions.

**Illustrations:**

- Purchasing agents purchase a variety of scientific testing services. They review the specifications outlined by the customer to ensure information pertaining to the performance period, contractor's obligations, products expected, etc., is clear and adequate. For example, if the specifications require testing of twenty soil samples for particular chemicals, the employee may suggest that, to improve the purchase description, the customer include information on--
the specific kind of analysis, tests, or equipment involved;

amount of soil and soil samples to be tested;

specific reporting timeframes and formats; and

special safety procedures.

They become familiar with the item or service sufficient to discuss requirements and questions with interested vendors. Purchasing agents attempt to determine reasons for lack of vendor response and brainstorm solutions for amendments to purchase descriptions with the customer and others. The solutions may involve changing specifications, delivery procedures, or reporting formats or timeframes.

- Purchasing agents purchase modified equipment or equipment repair services for assigned organization(s). The repairs or modifications typically involve the use of detailed RFQ's. For repair services, purchasing agents select or tailor various purchasing provisions, such as clauses stating the value of the item, warranty terms, standby provisions for periods of downtime, and special tests or inspections involved. Purchases of modified equipment may involve many parts and more than one vendor. Purchasing agents consider factors such as number of parts involved, which part, if any, has to be built first, the need for compatibility of parts, and number of manufacturers involved, to determine lead time for the vendor's performance and coordinative efforts necessary to ensure timely completion. Purchasing agents monitor vendor performance through contacts and review of progress reports. They discuss reasons for delays, testing failures, or price changes. They negotiate for price reductions or other remedies.

Level 1-5--750 Points

The work requires knowledge of specialized technical purchasing methods and procedures to perform complex purchasing work. For example, purchasing duties require substantive involvement in at least one of the following:

- negotiating and awarding bilateral purchase orders for professional studies (e.g., research studies), or for the exclusive manufacture of unique equipment, instruments, dies, etc.;

- developing and selecting criteria/technical ranking factors for purchases of a variety of detailed commercial service or construction projects;

- administering small purchases that require extensive monitoring and oversight to resolve complex problems (e.g., protests, claims, terminations, or substantial modifications), and coordinating/discussing these or similar problems with small purchase contractors and various agency or activity personnel.
- negotiating, awarding, and administering small purchases that involve clauses normally not applicable to small purchases (e.g., purchase orders that contain provisions related to default termination, liability, and Government furnished property); or

- negotiating, awarding, and administering small purchase orders that involve the use of instruments that are not firm fixed price (e.g., time and materials, labor hour, or other unpriced small purchase orders).

Illustrations:

- Purchasing agents purchase a variety of commercial service or construction projects for assigned customers. In addition to ensuring all critical information is included in the solicitation package, they also develop unique selection criteria for each purchase. For example, a particular service project may involve the use of many different kinds of equipment and trades personnel. Employees identify which factors (e.g., age and kind of equipment, skill of the operator, reliability of service) in addition to price, delivery, and transportation terms, will be essential to determining the best offer. They then analyze and compare each vendor's offer using these criteria. They may consider, for example, the capability and reliability of the various equipment that will be used, the background and skill level of the trades personnel employed by the vendor, and the firm’s reputation for performing quality work and providing follow-up service. Awards are usually based on an evaluation of which offer represents the greatest or best value. Frequently, the evaluation involves difficult decisions because the competing vendors have different strengths. As a result, various tradeoffs must be analyzed and considered. Purchasing agents must be prepared to explain selection of higher cost products to non-selected protesting vendors.

- Purchasing agents purchase various well-drilling construction projects for assigned customers. The projects often require substantial and ongoing post award monitoring of deliverables to ensure purchase order requirements are met, negotiate changes to the purchase order, modify purchase order terms, or supplement purchase orders because of unexpected occurrences or changing requirements. For example, if hazardous material is uncovered during a drilling project, purchasing agents might analyze cost, safety, and insurance considerations; determine if special permits and tests are required; conduct price negotiations resulting in substantial modifications of work arrangements and cost; and evaluate other alternatives, such as temporary work stoppage or termination for convenience.

**Level 1-6--950 Points**

The work requires practical knowledge of a wide range of technical methods, principles, and practices to perform purchasing work that is considerably more difficult than that described at level 1-5. Purchases frequently involve specialized services, specialized construction, or specially manufactured equipment. Purchasing duties differ markedly from level 1-5 because they require substantive involvement in essentially all of the following:

- negotiating and awarding bilateral purchase orders for professional studies (e.g., research studies), or for the exclusive manufacture of unique equipment, instruments, dies, etc.;
- developing and selecting criteria/technical ranking factors for purchases of a variety of requirements;

- administering purchase orders that require extensive monitoring and oversight to resolve complex problems (e.g., protests, claims, terminations, or substantial modifications), and coordinating/discussing these or similar problems with small purchase contractors and various agency or activity personnel;

- negotiating, awarding, and administering small purchases that involve clauses normally not applicable to small purchases (e.g., purchase orders that contain provisions related to default termination, liability, and Government furnished property); and

- negotiating, awarding, and administering small purchase orders that involve the use of instruments that are not firm fixed price (e.g., time and material, labor hour, or other unpriced small purchase orders).

**FACTOR 2, SUPERVISORY CONTROLS**

*Level 2-2--125 Points*

The supervisor or other designated authority assigns work with standing instructions on applicable procedures and policies to follow, performance expected, and priorities and deadlines to meet. For example, standing instructions may provide information on how to decide if the requirements should be purchased against an established contract or through open market procedures. This guidance may include an explanation of the applicable FAR parts and sections, forms required to prepare delivery or purchase orders, and any documentation required to justify the method of purchase. The supervisor provides additional specific guidance on new, difficult, or unusual assignments, including suggesting work methods or source material available. For example, if the employee is purchasing specialized services or specialized construction projects, the supervisor may provide the employee with a checklist of procedures and regulations to follow and assist the employee throughout the process.

The employee uses initiative to make or recommend purchases for recurring requirements independently. The employee refers situations not covered by instructions or practice to the supervisor for decision or help.

The supervisor reviews recommended awards and completed purchase files to ensure that the methods used by the employee are technically accurate and that they comply with established procedures.

Some employees work more independently than others, having become familiar with the purchasing methods and procedures used to make purchases for a variety of standardized requirements at varying dollar values. These employees may be assigned and may carry out work with less supervision than typically is found at this level because of their extensive purchasing experience.
Level 2-3--275 Points

The supervisor or other designated authority assigns work with standing instructions on objectives, priorities, and deadlines, and indicates special considerations or unusual requirements.

The employee plans and carries out successive steps necessary to make purchases and uses accepted practices or procedures to resolve problems and deviations. Problems and deviations include, for example, requirements that have fluctuating price and item characteristics, are sole source, and are urgently required, or items that are new to the market. The employee independently performs tasks, such as negotiating price with a sole source vendor, persuading reluctant vendors to bid, and collecting data to determine price reasonableness for requirements not acquired previously or recently. In other work situations, problems may result from the specialized nature of the requirement. For example, the employee may have to identify loopholes in specifications or statements of work that are very lengthy, detailed, or otherwise difficult to understand. The employee independently suggests revisions or additions to ensure information pertaining to the contractor's obligations is clear and adequate. After searching precedents, the employee consults with the supervisor or others to resolve major problems (e.g., how to prepare information that will be used to respond to written protests from nonselected vendors).

The supervisor reviews recommended awards or completed purchase files for technical soundness, appropriateness, and conformity to policy and requirements. The methods the employee uses to complete assignments usually are not reviewed in detail.

Level 2-4--450 Points

The supervisor or other designated authority defines the overall objectives and requirements of the work and provides further guidance or consultation at the employee's request.

The employee, having developed expertise in purchasing and administering orders for various kinds of requirements, is responsible for resolving most conflicts that arise, coordinating the work with others, and interpreting policy on own initiative to meet established objectives. For example, the employee regularly resolves conflicts in administering purchase orders, such as protests, claims, and terminations for convenience or default. The employee is delegated considerable latitude in committing the agency or activity to a course of action and typically has no higher level procurement expertise immediately available. It is generally not feasible to obtain higher level assistance anyway since many of the problems require immediate attention and intensive on-the-spot negotiation. The supervisor is, however, kept informed of progress or controversial matters.

The supervisor periodically evaluates completed work for results achieved and effectiveness in meeting requirements within legal and regulatory constraints.
FACTOR 3, GUIDELINES

Level 3-2--125 Points

A number of established procedures and specific guidelines are available and apply to work assignments. These include procurement history files, Federal Supply Schedules or other established contracts, standard operating practices, and regulations governing small purchases and delivery orders. Guidelines cover areas such as required and optional sources of supply, types and use of purchase orders, maximum ordering limitations, and forms to use when making purchases. Guidelines also explain, for example, how to order from schedules, when documentation is required (e.g., waivers, sole source justifications, and verifications of price reasonableness), when it is appropriate to establish blanket purchase agreements, and how to account for use of imprest funds.

The employee uses judgment in selecting the appropriate reference and procedure to make purchases. For example, the employee selects the appropriate purchasing and solicitation method, form, documentation, and standard terms. There may be minor gaps in guidelines, and the employee may be expected to use some judgment and initiative in resolving aspects of the work not fully covered by instructions (e.g., when determining whether the important characteristics of an item match an item description in a mandatory schedule, judging whether quotes are for equal items, suggesting item substitutes, or preparing waivers). The employee refers situations that require significant deviations to the supervisor or others for guidance or resolution.

Level 3-3--275 Points

Guidelines, such as those described above, are available but are not completely applicable to many aspects of the work because of the unique or complicating nature of the requirements or circumstances. For example, when ensuring the adequacy of specialized purchase descriptions there are no directly related reference sources, such as standardized descriptions in catalogs or procurement history files.

The employee uses judgment to interpret guidelines, adapt procedures, decide approaches, and resolve specific problems. This includes, for example, reviewing detailed nonstandardized statements of work for adequacy, developing technical ranking factors for award determinations, or negotiating terminations for convenience or default.

FACTOR 4, COMPLEXITY

Level 4-2--75 Points

The work involves performing a variety of related tasks using primarily simple noncompetitive purchasing methods. Methods include, for example, placing orders against single award Federal Supply Schedules and other similar contracts, or using imprest fund or credit card accounts.
The employee makes decisions, such as whether to solicit additional sources or question a price, based on a review or knowledge of similar purchases and basic procedures.

The employee selects purchasing methods by considering a few factors, such as price, available sources, and urgency of requirement. The employee recommends awards using primarily price and/or delivery as determining factors.

**Level 4-3--150 Points**

In addition to using procedures described at the next lower level, the work involves using different processes and methods to (1) make a variety of competitive or sole source small purchases and/or (2) make a variety of purchases against various established contracts and agreements (e.g., multiple award schedules, BPA's, requirements contracts). The employee uses different solicitation methods, ordering or reporting procedures, purchasing methods, or clauses and provisions depending on the type, quantity, dollar value, or urgency of the requirement.

The employee makes choices, such as whether to meet requirements by ordering against an existing contract or through open market procedures, whether and how to solicit quotes, or what terms and conditions apply based on a review of factors, such as the nature of the requirement, urgency of the need, estimated amount of the purchase, and availability of sources.

The employee decides on a purchasing strategy (e.g., how to solicit, whom to solicit, which clauses to include, which offers to accept, or how much lead time is needed) by analyzing a variety of information, such as specifications, FAR parts, history files, item characteristics, or catalogs. In addition to considering price and delivery, some employees may recommend or make decisions based on analysis of various tradeoffs (e.g., cost of renting vs. purchasing, free services included, vendor reputation or previous performance).

**FACTOR 5, SCOPE AND EFFECT**

**Level 5-2--75 Points**

The work involves providing purchasing services that are covered by well-defined and precise procedures and regulations (e.g., repeat orders for commercial requirements). The employee clarifies what is needed and when, and selects purchasing methods and sources from a range of available options.

The employee's work products, such as recommendations for awards, affect the smooth flow of everyday operations.
Level 5-3--150 Points

The purpose of the work is to purchase various commercial and/or specialized requirements. The work involves applying conventional practices to resolve a variety of purchasing problems (e.g., inadequate or restrictive specifications, lack of multiple suppliers, urgent need, and insufficient price history).

Purchasing advice and decisions directly affect the ability of serviced programs to conduct business adequately. In some situations, the quality of the purchasing advice and decisions may affect the operation of certain programs. For example, ensuring the clarity and completeness of detailed purchase descriptions for specialized equipment allows a customer to pursue a particular course of action without lengthy delays. In other situations, the work may affect the physical well-being of persons. For example, arranging for the timely delivery of urgently needed medical supplies or equipment affects the adequacy of patient care.

FACTOR 6, PERSONAL CONTACTS AND FACTOR 7, PURPOSE OF CONTACTS

Match the level of regular and recurring personal contacts with the purpose of contacts and credit the appropriate point value using the chart below.

Persons Contacted

1. Contacts include employees in the immediate organization, such as clerks and/or other purchasing agents. Outside contacts include customers who are submitting simple requisitions and suppliers under established contracts who are filling repeat orders.

2. Contacts include employees in the same agency or activity but outside the immediate organization. For example, contacts may be with personnel in supply, contracting, finance, requirements initiating offices, or at warehouse/delivery receipt sites. Contacts outside the agency include commercial suppliers, contractors, and personnel at other agencies, such as the Department of Labor or General Services Administration.

3. In addition to contacts at lower levels, contacts include technical or legal representatives of firms who are negotiating substantial purchase order changes or terminations for default or convenience, or who are protesting the basis for nonselection for award.

Purpose of Contacts

a. The purpose of the contacts is to clarify or exchange information related to purchasing routine requirements. Contacts with customers are to obtain missing information, advise on status of work, and get approval for substitutes or changes in delivery dates, prices, quantities, etc. Contacts with vendors are to obtain information on items, prices, discounts, and delivery dates.
b. The purpose of the contacts is to plan and coordinate actions to prevent, correct, or resolve delays or misunderstandings in the purchasing process. This includes contacts with customers to discuss specifications that may be inadequate or too restrictive, realistic lead times or prices, or other avenues for filling needs (e.g., renting vs. purchasing). Contacts with vendors are to clarify requirements and negotiate issues, such as establishing adequate price reductions for deviations in product or delivery, modifying certain terms, or waiving penalties for returned items. In some situations, a moderate amount of persuasive skill may be needed to encourage reluctant vendors to quote, resolve minor conflicts, or get agreement on changes affecting product, price, or delivery.

c. Contacts are to settle conflicts or disputes that arise during the course of the small purchase or to respond to and explain decisions through negotiation and persuasion. The individuals or groups frequently are uncooperative and have different negotiation viewpoints. The employee must be skillful in negotiating issues, such as termination settlements or other significant changes in the small purchase. Contacts also may be with protesting vendors to justify award decisions that are based on greatest value determinations rather than on price or delivery.

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*These combinations are probably unrealistic.

**FACTOR 8, PHYSICAL DEMANDS**

*Level 8-1--5 Points*

The work requires some physical effort, such as standing, walking, bending, or sitting. There are no special physical demands.

*Level 8-2--20 Points*

The work requires above average physical agility to walk around or over building materials, excavation sites, and heavy equipment found at construction sites or similar areas. The employee visits such sites on a regular and recurring basis.
FACTOR 9, WORK ENVIRONMENT

Level 9-1--5 Points

The employee performs work in an office setting involving everyday risks or discomforts. Normal safety precautions are adequate.

Level 9-2--20 Points

The work involves moderate discomfort when visiting sites away from the office. The employee may be required to wear protective clothing, such as a hard hat, goggles, gowns, or boots when visiting construction sites, laboratories, or other areas.