

Iowa Department of Administrative Services – Human Resources Enterprise  
Classification Series Guidelines

## Purchasing Agent Series

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### Classes in the Series

<u>Class Code</u>	<u>Class Title</u>
00210	Purchasing Agent 1
00211	Purchasing Agent 2
00212	Purchasing Agent 3

### Series Concept

This series includes those employees that write product specifications, conduct formal and informal bids, purchase goods and services, engage in reverse auctions, contract management and purchase from a targeted small business for state agencies. The following definitions are applicable to these job functions.

- **Contract For Service** – an agreement calling for a contractor’s time and effort, rather than for a product.
- **Contract Management** – means having the responsibility to assure that a contractor performs satisfactorily its obligations, on time, and within budget, as a condition to contract continuation and invoice payment.
- **Formal Bid** – requires that a proposal be authorized by law and results in the procurement of goods or services. Process includes developing a written Request For Proposal (RFP) and/or a Request For Bid (RFB), publication of the proposal/bid, answering vendors written questions, developing formal criteria to evaluate/rate the responses, documenting, evaluating, and tabulating responses, making the response available for public inspection, awarding the proposal/bid, and development of a written contract, which is signed by the legal parties.
- **Informal Bid** – a competitive bid process for supplies or services that is usually conducted by letter, telephone, fax, email, or other means and does not require a sealed bid, public opening or public reading of bid. The administrative rules define “Informal competition” as a streamlined competitive selection process in which a department or agency makes an effort to contact at least three prospective vendors identified by the department or agency as qualified to perform the work described in the scope of work to request that they provide bids or proposals for the delivery of the goods or services the department or agency is seeking.

**Procurement Center of Excellence** – Certification/advanced purchasing authority from the Department of Administrative Services (DAS) bestowed on an agency when personnel engaged in the purchase of goods complete enhanced procurement training established by Director of DAS, or designee, within two-years of commencement of training. Agents of departments/institutions that have been certified as a “procurement center of excellence” may conduct procurement of non-master agreement expendable/non-expendable items up to \$50,000 per transaction.

- **Reverse Auction** – an electronic process that occurs when an agency posts the highest bid they will accept and suppliers try to under-bid other suppliers.
- **Targeted Small Businesses** – vendors certified by the Department of Inspections and Appeals

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that agencies can use for purchases up to \$10,000, without use of bidding procedures.

- **Master Contract** – The Iowa Administrative Rules defines master agreements/contracts as: “a contract arrived at competitively which establishes prices, terms, and conditions for the purchase of goods and services in common use. Agencies may purchase from a master agreement without further competition. These contracts may involve the needs of one or more state agencies. Master agreements for a particular item or class of items may be awarded to a single vendor or multiple vendors.”

Other departments/institutions have delegated authority to purchase goods up to \$5,000.00 without processing a purchase requisition to the Department of Administrative Services – General Services Enterprise (GSE), unless available through a master agreement.

### Exclusions

The following positions are excluded from this series:

1. Positions that process clerical work of a semi-technical nature involving a purchasing operation should be classified as purchasing assistants.
2. Positions that have a primary responsibility for performing inventory receipt maintenance, and disbursement functions should be classified in the Storekeeper Series.
3. Positions with a primary responsibility for reconciling/approving payment vouchers for department/institution expenditures and maintaining financial records should be classified in the Accounting Clerk Series.
4. Positions that have a primary responsibility for performing administrative support duties, including general clerical and typing should be classified in their appropriate clerical or typing series.

Positions with a primary responsibility for supervising/managing the general business and financial operations of a state department/institution should be classified in the Public Service Executive Series

### Class Distinctions

#### Purchasing Agent 1

Employees in this class spend a majority of time acquiring standardized, expendable/ non-expendable items from suppliers valued at \$5,000 or less for their agency/institution with the primary focus of work being the processing of delivery orders against established state purchasing master contracts. Agents may also conduct informal bids via telephone or in writing. Decisions are subject to approval by the supervisor. Most of the informal bids conducted at this level do not require a closing date for bid submission and are usually conducted via phone, rather than requesting written bid responses.

This class is distinguished from the Purchasing Agent 2 in that bids are conducted by phone and do not have a timeline for bid submission and that most purchasing agents at this level will not have completed purchasing classes by the National Institute of Government Purchasing.

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### **Purchasing Agent 2**

Employees in this class have been certified by DAS as a “Procurement Center of Excellence” having completed all required training and been granted advanced purchasing authority from DAS.

Employees in this class spend a majority of time conducting informal bids for a variety of standardized, expendable/non-expendable items valued at \$50,000 or less, and processing delivery orders against established state purchasing master contracts. The majority of informal bids are conducted via electronic or written communication, rather than the telephone. Most bids include a timeline and a deadline for submitting the bid. Agents conduct the service contract bidding process for an agency/institution, including selecting vendors for bid solicitation, evaluating bids, making recommendations for award and awarding bid to lowest compliant vendor. Purchasing agents 2’s will have completed procurement courses conducted by the National Institute of Government Purchasing. Two courses that most will have completed is: Introduction to Public Procurement and Sourcing in the Public Sector. At this level, employees have a responsibility for directing/managing the purchasing process for an agency/institution using considerable independent judgment. Decisions may be subject to the approval of the supervisor.

This class is distinguished from the Purchasing Agent 3 in that most of the bids do not require use of the sealed bid process.

### **Purchasing Agent 3**

Employees in this class spend a majority of time conducting formal solicitation/bidding process for a variety of goods and services for multiple state agencies/institutions or the departments of Transportation, Lottery Authority, Blind Commission, Iowa Prison Industries (Corrections) and the Iowa Communications Network, construction procured by the Department of Natural Resources, and liquor procured by the Alcoholic Beverages Division (Commerce). The agent conducts a market analysis of high dollar solicitations/bids to determine market conditions and pricing benchmarks. They develop standardized specifications, prepare solicitations and approve or recommend the approval of supplier offerings based on the best combination of cost and value. A majority of time is spent by the employee in making final decisions on procurement methods, contract and purchase order terms/conditions, source/price and contract management. At this level, agents investigate new products, sources of supplies/suppliers, procurement strategies, promote master contracts to political subdivisions and work with vendor community/targeted small businesses. Supervision received is limited and decisions may be subject to supervisory approval.

The Department of Administrative Services’ (DAS) General Services Enterprise (GSE) Procurement Services acquires commodities and services for all state agencies except the departments of Transportation, Lottery Authority, Blind Commission, Iowa Prison Industries (Corrections) and the Iowa Communications Network, construction procured by the Department of Natural Resources, and liquor procured by the Alcoholic Beverages Division (Commerce). An interagency agreement between the Department of Public Defense and the Department of General Services effective August 1, 1998 allows Public Defense purchasing authority up to \$10,000.

*Effective date: 09/11 BR*