

HQ CENTAF SOUTHWEST ASIA

BLANKET PURCHASE AGREEMENT (BPA) PROCEDURES GUIDE



USCENTAF-FWD AND JTF-SWA/A4/J4

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This Blanket Purchase Agreement (BPA) Procedures Guide applies to all contracting offices and Contingency Contracting Officers (CCOs) deployed to the Southwest Asia Area of Responsibility (AOR), as well as all Wing/Squadron or equivalent customers using decentralized BPAs within the AOR. This guide is directive in nature and shall be used to set-up each deployed location's BPA Program. This guide is used to supplement Federal Acquisition Regulations (FAR), Department of Defense (DOD), and Air Force regulations. It also prescribes specific requirements for the establishment, use, and control of centralized and decentralized BPA's.

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Chapter 1

GENERAL

1.1 PURPOSE. The purpose of this guide is twofold. First, to provide CCOs guidance on how to establish BPAs and properly administer them. Second, to establish rules and procedures for the deployed Wings to use in establishing and administering their BPA accounts. This guide will explain the BPA process so they can understand how to correctly use BPAs to help accomplish their mission.

1.2 DEFINITIONS.

1.2.1 Approved Price List. A price list assigned to a BPA where the CCO has approved in writing, normally on the price list, for a specific period of time, normally one year.

1.2.2 Blanket Purchase Agreement. A BPA is a simplified acquisition method of filling repetitive needs for supplies or services by establishing "charge accounts" with qualified sources of supply or services. The whole point is to reduce everyone's administrative burdens by reducing the number of repetitive purchases made for the same items. They are not contracts, but merely advance agreements for future contractual undertakings. BPAs set prices, establish delivery terms and provide other clauses, so that a new contract/purchase order is not required for each purchase.

1.2.3 BPA Call. A written order using a BPA Call Sheet, by an authorized person for supplies or services.

1.2.4 BPA Call Sheet. A sheet listing all supplies or services needed, filled out prior to placing an order by the using organization.

1.2.5 Call Limitation. A not to exceed dollar threshold (limit) placed on an ordering officer when placing calls. All calls placed by an ordering officer shall not exceed \$2,500. CCOs may place calls against BPAs not exceeding \$200,000.

1.2.6 BPA Unit Program Manager (UPM). A senior NCO or officer appointed by the Squadron Commander to act as the focal point for all unit BPAs. Responsible for ensuring all guidelines and procurement procedures are followed.

1.2.7 Call Number. An Alpha/Numeric number assigned to each call. Numbers are authorized by the contracting office and will start with an "A", "B" or "C" followed by a three digit numeric number such as 001. All calls placed by CCOs will use the letter "A" and all customer calls will be assigned the "B", "C", etc. All call numbers run consecutively for the life of the BPA and do not start over at each new fiscal year. An example of a call number would be B001.

1.2.8 Call Register. A Spread Sheet identifying all calls placed against a specific BPA for a particular month.

1.2.9 CCO. Contingency Contracting Officer. A warranted contracting officer deployed to support a contingency operation.

1.2.10 Centralized BPA. A BPA where only the contracting office controls and places the call.

1.2.11 Decentralized BPA. A BPA where customers or users place the calls.. This type of BPA is controlled by the customer and monitored by the contracting office.

1.2.12 Delivery Ticket. A ticket provided by the contractor to show proof of delivery. This ticket is used by the customer and the contractor to show proof of delivery.

1.2.13 Funding Authority. A funding instrument used to fund BPAs.

1.2.14 Invoice. A financial bill submitted by the contractor for payment of supplies or services rendered.

1.2.15 Line Item. A numeric number assigned to a particular item on the approved price list. Shall be used when placing calls against a BPA.

1.2.16 Ordering Officer. An individual appointed in writing by a CCO to place calls against a specific BPA.

1.2.17 Receiving Inspection. A verification of what was order on the BPA Call Sheet to ensure the BPA holder satisfactorily received what was ordered.

1.2.18 Splitting Requirements. Illegally placing more than one call to stay within the \$2,500 threshold.

1.3 TYPES OF BPAS.

1.3.1 Prepriced BPA. All prices are preapproved by the CCO and only those items may be ordered on the BPA. The contractor submits the priced items and the CCO approves them when the BPA is established.

1.3.2 Unpriced BPA. Goods and services are priced individually by the CCO prior to placing an order. Only a CCO may use this type of BPA.

1.4 CONTRACTING OFFICE

RESPONSIBILITIES. The Chief of Contracting shall oversee all assigned BPAs and the BPA program. CCOs shall be responsible for all actions under their BPA program. Procedures within this guide, Federal Acquisition Regulation (FAR), Department of Defense FAR, and Air Force FAR are applicable to the procurement and administration of the BPA program.

1.5 DECENTRALIZED USERS

RESPONSIBILITIES. Unit Commanders are responsible for all BPA accounts assigned to their units. Responsibilities include;

- Ensure funds are available for each BPA.
- Assign a Primary and Alternate individual to be trained and appointed as OOs. The Primary is responsible for establishing and maintaining all files and documents (such as the Monthly Call Register).
- Assign a senior NCO or officer to the position of Squadron BPA Monitor, who shall act as the focal point concerning all BPA matters.
- Establish BPA files and supporting documentation.
- Monthly certify all expenditures by reviewing and signing the monthly report and monthly call register. Then submit them to the CCO.
- Take appropriate action against personnel who exceed their authorization limit or fail to follow appropriate purchasing procedures.

CHAPTER 2

CCO PROCEDURES FOR ESTABLISHING BPAs

2.1 ESTABLISHING A BLANKET PURCHASE AGREEMENT.

2.1.1 BPA Authority. (FAR Part 13.2, Blanket Purchase Agreements) The following are circumstances under which contracting officers may establish BPAs:

- There are a wide variety of items in a broad class of supplies or services that are generally purchased, but the exact items, quantities, and delivery requirements are not known in advance and may vary considerably.
- There is a need to provide commercial sources of supply for one or more offices or projects in a given area that do not have a need or authority to purchase otherwise.
- Use of this procedure would avoid the writing of numerous purchase orders.

2.1.2 Identify Need. The CCO should identify squadrons that submit AF form 9s on a continual basis for the same or like items. Upon identification of squadrons who have a requiring need for like items the CCO should contact the unit on the possibility of establishing a BPA to eliminate submitting an AF form 9. In order to establish a BPA, all that is required is a simple letter from the unit commander to the contracting office requesting CCO to establish a BPA with some basic information such as:

- *Type of supplies or services required*
- *Simple Statement of Work (SOW)*
- *Recommended source(s)*
- *Shipping or delivery information*

2.1.3 Statement of work/performance: A simple statement outlining what the supplier is expected to do. Include items such as

frequency of service, place service is to be performed, how soon items have to be delivered after a call is placed, etc. The CCO shall provide guidance on writing this SOW.

2.2 COMPETITION.

2.2.1 Compete all BPAs. All BPAs awarded shall show that they were competed. If a BPA is not competed a Determination and Finding (D&F) shall be prepared to show that the price is fair and reasonable. As a CCO you are responsible to ensure the government pays a fair and reasonable price for all goods and services received. As such you must seek competition and determine that the price list provided by a contractor is fair and reasonable.

2.2.2 Market Surveys. A market survey shall be conducted at a minimum of annually to verify that prices are fair and reasonable. The market survey shall be documented and filed in the BPA folder.

2.3 SOLICITATION PROCEDURES.

2.2.3 Request for Quote (RFQ). The RFQ package shall be sent to as many qualified contractors who can perform the service or provide the supplies. The RFQ package shall contain, at a minimum the following;

- Letter to the contractor requesting to establish a BPA with their firm to supply the required goods or services.
- A proposed Standard Form 1449 with start date, expiration date, updated clauses, and attached SOW.

- A request for contractor to provide a detailed price list. The contractor should provide their price list indicating;

- *A line item number or part number for easy identification of each item that he can supply.*

- *A price for each item and the unit of issue.*

- *An effective date when the price list takes effect.*

- *An expiration date of the price list. (Request that all prices on the price list stay valid for one (1) year. If no expiration date indicated the CCO will approve the list for a maximum of one year.*

2.4 PRICE LIST APPROVAL. All BPAs shall have a price list that is approved by a contracting officer prior to any calls being placed against the BPA.

2.4.1 Prices submitted by the contractor shall be evaluated to determine that the items are authorized under that BPA and that the price offered is considered fair and reasonable.

2.4.2 Price list shall have the contracting officers printed name, title, signature, effective and expiration date affixed to the price list.

2.4.3 After approval, the CCO shall send a copy of the price list to each user of the BPA.

2.5 BPA AWARD.

2.5.1. Each supply or service shall have multiple BPAs awarded with orders rotated among them. A minimum of two per item is considered acceptable or if only one source is available then this must be documented by a D&F.

2.5.2. All awards of BPAs shall be accomplished on SF Form 1149. Awards of BPAs shall be consistent with standard business practices and FAR, DFAR and AFAR requirements.

2.5.3. All BPAs will have the CCO signature and the contractors signature certifying that they accept the terms and conditions of the BPA.

CHAPTER 3

CCO ADMINISTRATION OF BPA's

3.1 BPA FILE SET-UP

3.1.1 CCO files need to be setup and maintained in a standardized format. Each BPA file will be established in a standard six-part contracting folder and tabbed appropriately. As a minimum CCOs shall use the attached BPA Six Part File Index (see atch 10) to set up and maintain each BPA file.

3.1.2 Customer files shall have the same standardization as the CCO files. Maintenance and filing of unit BPA information is critical to a successful BPA program;

3.2 BPA TRAINING.

3.2.1 Customer training is a must if the government is to ensure that we are getting what we pay for. It is especially important in

this AOR due to the squadron personnel rotations every 120 days. The CCO shall ensure squadrons have at least one trained person (preferably two, a Primary and Alternate) for each BPA. The squadron program manager shall assist in identifying rotating personnel that require training. The squadron commander and the squadron program manager must also receive modified BPA training.

3.2.2. CCOs will develop a training package to train OOs. The training should be substantial (usually about four hours) and include taking the OOs to the contractors location. It should follow the format on the BPA Training Certification form (see atch 7).

3.2.3 CCOs will develop a modified training program for squadron commanders and the senior NCO BPA program managers.

3.2.4 BPA training will be accomplished and then documented on the BPA Training Certification form (see atch 7).

3.3 APPOINTMENT AND NOTIFICATION LETTERS.

3.3.1 After training, the CCO formally appoints the Ordering Officers on an Ordering Officer Appointment Letter (see atch 9) which appoints the personnel, specifies call limits, lists type of call number, and lists expiration date of who may place calls.

3.3.2 A Contractor Ordering Officer Notification Letter (see atch 9) is accomplished and sent to the contractor identifying who may place calls, type of call number and call limits.

3.4 FUNDING ISSUES.

3.4.1 Obtaining funds: All BPAs are written for zero dollars; therefore, funding must be obtained prior to placing any calls against a BPA. The contracting officer shall ensure that units maintaining decentralized BPAs are aware of how to obtain funding, types of funding documents, and deduction of funds after calls have been placed against a BPA. The contracting officer should work with each unit BPA Program Manager, Unit Resource Advisor (RA) and the local Finance Officer to aid in obtaining funding for decentralized BPAs.

3.4.2 Funding documents: There are basically three (3) types of funding documents used to fund BPAs.

- AF Form 616, Obligation Authority
- AF Form 9, Request For Purchase.
- MIPR: Military Interdepartmental Purchase Request.

3.4.3 Tracking Funds: After BPAs are funded, appointment letters and notification letters have been issued, and the BPA file is set up and/or inspected, the BPA is ready for use. Units maintaining decentralized BPAs shall track all funds expended on the BPA. Tracking of funds shall be maintained on a yearly call register identifying all calls placed for each fiscal year. Additionally monthly call registers shall be maintained identifying all calls placed for each month. The yearly and monthly call register shall identify funds available and funds expended.

3.4.3.1 One of the most important responsibilities of the BPA user as well as the contracting officer, is to ensure that adequate funds are available to cover any call that has been placed, and that over-obligations never occur. Never place a call today based on the understanding that necessary funds will be

available tomorrow! If calls are placed without adequate funding, an unauthorized action has occurred and the person placing the call may be held personally liable for the cost of the call.

3.4.3.2 Fiscal Year Funding: Funding for all BPAs are established on a fiscal year basis; that is, funding is good from 1 Oct XX through 30 Sept XX of the following year. The funds exist on the funding document that was obtained;

however, the funds you have on your funding document "expire" at the end of each fiscal year which is 30 September. Any funds remaining on the funding document at the end of the fiscal year expire or are "de-committed". To resume placing calls in the new fiscal year, a new funding document shall be obtained prior to placing any calls.

CHAPTER 4

CCO INSPECTIONS AND REPORTS

4.1 MONTHLY INSPECTIONS. The contracting officer shall conduct a monthly inspection of all BPAs. This inspection shall be conducted using the Monthly CCO Review Checklist (see atch 17 and 17a). Results of inspections shall be documented and forwarded to appropriate unit commanders for action/replies. If severe findings are discovered, the CCO may suspend that BPA until deficiencies are corrected. The CCO will schedule appointments with the using activities to conduct these inspections every month.

4.2 CUSTOMERS MONTHLY BPA REPORT. At the first day of each month the customer, BPA user, must submit a Monthly BPA Report (see atch 16) to the CCO on the activity of the assigned BPA. A copy of the current months call register and copies of all receiving reports

generated during the month will also be attached to the Monthly BPA Report. The report is based on four (4) numbers for the month; how many actions (calls), line items used, total dollars expended for the month and total dollars expended for the FY. A monthly report is mandatory even if the BPA was not used. If the BPA was not used during a given month, a negative report must be submitted including a copy of the monthly call register indicating no calls were placed that month..

4.3 CONSOLIDATED BPA REPORT. The contracting officer shall consolidate all BPA unit reports to include centralized reports and forward the information to the Chief of Contracting who will forward to CENTAF-FWD/JTF-SWA Chief of Contracting

CHAPTER 5

CUSTOMER PROCEDURES AND TRAINING

5.1 INTRODUCTION.

This chapter is to establish procedures for Wing/Squadron/equivalent customers to use in setting up and maintaining their BPA programs. By following these required procedures the customers will be trained on the correct way to conduct purchases under a BPA. Customers shall be knowledgeable of all material within this training guide for use and application. Any deviations from this guide to meet local mission requirements must be justified and approved in writing by the CCO..

5.2 PURPOSE. The purpose of this training is to provide you, our customer, the information and knowledge to perform as a purchasing agent for your unit. This training will explain the BPA process so you can understand how to use BPA's to help accomplish your mission.

5.3 DEFINITION OF A BPA. A BPA is a simplified acquisition method of filling repetitive needs for supplies or services by establishing "charge accounts" with qualified vendors. The whole point is to reduce everyone's administrative burdens by reducing the number of repetitive purchases made for the same items. They are not contracts, but merely advance agreements for future contractual undertakings. BPAs set prices, establish delivery terms and provide other clauses, so that a new contract/purchase order is not required for each purchase. Another unique feature of a BPA is that we can write it to last up to five years. This is possible because BPAs don't actually cite funds. We'll explain more about that later.

5.4 TYPES OF BPAS. There are basically two types of BPAs, either "centralized" or "decentralized". The significant difference between the two is who places the calls. Placing "a call" is simply placing an order with the vendor for a specific quantity of the items or services provided under the BPA.

5.4.1 Centralized BPA: In a centralized BPA, only a CCO working in the Contracting Office is authorized to place calls. Whenever you need to place an order under a centralized BPA, you call the CCO, and they will place a "call" with the vendor.

5.4.2 Decentralized BPA: This is the most common type of BPA. It's also the most popular with our customers because it puts you in the driver's seat. Under this type of BPA, certain positions or individuals, in your organization are given the authority to place calls directly with the vendor. These individuals are called Ordering Officers (OOs). The benefits are greater control and flexibility you have when filling your requirements.

5.5. ESTABLISHING A BLANKET PURCHASE AGREEMENT.

5.5.1 The Request. All it takes to establish a BPA is a simple letter from a unit commander or equivalent to the CCO. The letter asks the CCO to establish a BPA and provides some basic information such as:

- *Type of supplies or services required*
- *Simple SOW*
- *Recommended source(s)*
- *Shipping or delivery information*
- *You'll also have to submit a simple statement outlining what you expect the supplier to do. Include items such as frequency of service, place service is to be performed, how soon items have to be delivered after a call is*

placed, etc. Your CCO can give you guidance on writing this Statement of Work.

5.6 THE CONTRACTING PROCESS.

Once your CCO has received your request, they can begin the work of establishing a BPA with a supplier. Establishing a BPA requires the contracting officer to issue a solicitation to vendors that can supply the service or supply that you, the customer, requested. The following is what comprises the Solicitation.

5.6.1 Solicitation. Once the CCO receives your request they will issue a solicitation to as many vendors as possible that can perform the service or provide the supplies that you need. The solicitation is comprised of several different areas:

- The SF 1449 is the actual contractual document that the U.S. Government uses with the vendor. It establishes the type of service or commodity to be supplied, effective date and general information concerning the BPA.
- The Statement of Work: This explains exactly what the contractor is required to do, i.e. supply commodities within a specific period of time or perform a service to meet a standard.
- The Schedule: This is a basic description of the agreement and tells the contractor general information concerning BPA's. It has the same effect as clauses.
- BPA Clauses: These are requirements that have been selected from the Federal Acquisition Regulation, DOD Acquisition Regulation, Air Force Acquisition Regulation or locally that tells the contractor terms and conditions of the BPA.

- Price List: This is exactly what the name implies. The price list identifies a line item number, a description, a unit of issue, and a price. All BPAs shall have a Price List that is approved by a contracting officer with an effective date and an expiration date.

5.6.2 Evaluation. After issue of the solicitation, the CCO will receive quotes back from the vendors that were solicited. These are just quotes and an evaluation must be accomplished by the CCO to determine if the vendor is capable of performing as outlined in the SOW, and to determine if the vendors prices are fair and reasonable.

5.6.3 Award. After a complete evaluation by the CCO of all solicitations, they will make a minimum of two awards to vendors who have been determined to be responsive and responsible and who have the lowest prices. The reason for awarding two BPAs for the same service or supplies is that it provides the customer flexibility in ordering items and ensures future competition.

5.7 AFTER BPA AWARD Once the BPA is awarded your CCO will issue the new BPA to your organization, HOWEVER, IT CANNOT BE USED until several tasks have been accomplished and completed. The tasks that must be accomplished prior to use of the BPA are listed below:

5.7.1 Funding of the BPA. You'll notice that your BPA is written for zero dollars. You'll need to coordinate with your organization's Resource Advisor (RA) and Finance Officer to request funds be obligated for this BPA. Funding will be provided to you through your RA using either an AF Form 616, Obligation Authority, or an AF Form 9, Request For Purchase. The funds they give you on either of

these documents are set-aside (committed), for your exclusive use under this BPA, and can be used for nothing else. Be sure your CCO gets a copy of your funding document with all updates. After you've received funds, you need to track everything you use. When you place a call, you've spent (or obligated) whatever that call was worth. You'll enter all of the information about the call, including the cost, on the call register spreadsheet, which we will talk about later.

5.7.2 Request for appointment of BPA Monitor from unit commander. You must have a letter on file assigning you as a BPA Ordering Officer. This letter is issued and signed by your unit commander and forwarded to the contracting office requesting the OO be formally appointed.

5.7.3 CCO training of each OO prior to performing their BPA duties. Your CCO will sit down with you and train you on the use of your BPA. They'll also give you a copy of this Instruction and you'll be asked to sign a statement for the CCO's files acknowledging that you've been trained on how to use and administer your new BPA.

5.7.4 CCO training of squadron commanders/equivalents and the NCO squadron program managers. The CCO will provide a modified training session for these management personnel.

5.7.5 Set-up and inspection of unit BPA folders. You will need to set up a unit BPA file to maintain all records associated with purchasing off of your BPA. The unit BPA file shall be set-up in a six part folder tabbed and indexed as shown in the unit BPA File Index (see atch 11).

5.7.6 Appointment of Ordering Officer Letter from the CCO: You must have a letter on file in your squadron BPA file, assigning you

as an Ordering Officer. This letter is issued and signed by a contracting officer after the above requirements have been satisfied. *If you do not have an appointment letter from a contracting officer for your BPA you may not place any calls.*

5.8 BPA ORDERING PROCESS OVERVIEW. The following is an overview of the BPA ordering process from identification of a mission requirement to receipt of materials or services to support your squadron's mission. You should understand this process in order to set up the procedural and administrative requirements for your BPA program.

- A requirement has been identified for the service or supply on your BPA.
- Verify that you have funding on your BPA. *(DO NOT PLACE A CALL UNLESS FUNDING IS COMMITTED ON YOUR BPA)*
- Verify that the service or commodity is on your Approved Price List. *(DO NOT ORDER ITEMS THAT ARE NOT ON THE APPROVED PRICE LIST)*
- Verify that the Price List is signed by a contracting officer and the Price List is current, (has a start and expiration date).. *(DO NOT PLACE CALLS ON AN EXPIRED PRICE LIST).*
- Complete BPA Call Sheet by identifying the requirement by line item number and description on your BPA Call Sheet.
- Fax or hand carry your price list to the vendor.
- Log your call on your BPA Monthly Call Register.
- Contractor delivers goods or service.
- Inspect the goods or services and verify that it matches the BPA call sheet of what

was ordered. (*VERIFY THE PRICE MATCHES THE PRICE ON THE APPROVED PRICE LIST.*) (*DO NOT ACCEPT GOODS OR SERVICES FOR ITEMS THAT WERE NOT ORDERED.*)

- Receipt for goods or services on the contractors delivery ticket only if it is what you asked for. (*THE ORDERING OFFICER WHO PLACED THE CALL CAN NOT RECEIPT FOR THE GOODS OR SERVICES.*)
- Mark off the BPA call as closed.
- Receive Invoice from contractor.
- Verify that the invoice reflects an accurate amount of what was ordered. If the invoice reads different than the BPA call sheet, notify your CCO.

5.9 PROCEDURES AND ADMINISTRATIVE REQUIREMENTS.

5.9.1 Ensure Funding Is Available. The unit OO will ensure initial funding and requested incremental funding was placed on the BPA by either an AF Form 9 or a AF Form 616. In-order to ensure funds are still available, the OO will track funds from initial receipt of funds and deduct funds as calls are placed. If additional funding is required contact your Resource Advisor and have funds placed in your BPA account. *DO NOT PLACE CALLS AGAINST YOUR BPA WHEN YOU HAVE NO FUNDS.*

5.9.2 Fill Out A Call Sheet. The BPA Call Sheet (see atch 14) is a list of the items or service that you plan on ordering from the BPA. It lists the line item or part number from the approved Price List, description, quantity ordered, unit price, extended price and total price of what is being ordered. A separate call sheet should be filled out for each call placed. (*ONLY ITEMS IDENTIFIED ON THE APPROVED PRICE LIST MAY BE ORDERED. ITEMS THAT ARE NOT ON THE APPROVED PRICE LIST MAY NOT BE ORDERED ON YOUR BPA.*)

5.9.3 Only Order Items From The Approved Price List. When you requested to establish your BPA you had an idea of what was required in the areas of supplies or services that you needed to support your squadron's mission. Based on that, a BPA was established using a Price List of items that you requested on a recurring basis. *You may only order items from this approved price list.* As stated earlier, make sure your price list says that its good for a specific period of time and that it's been approved by your CCO. Also question any items that seem too high priced and report them to the CCO.

5.9.4 Do Not Order Unauthorized Items. Ordering Officers may not order items which are not related to their BPA. The following are two examples of ordering items that are not authorized.

- The first example is ordering outside the scope of the BPA. If you have a BPA to purchase electrical appliances you cannot ask them to repair electrical appliances (unless it is a warranty issue). You may request the CCO to increase the scope of the BPA (to include appliance repair) and obtain price lists for the new service or supply. But you cannot place a call for unauthorized services. If you are only ordering off of an approved price list this should never happen.
- The second example is ordering items which are not on the price even though the contractor may carry the item. Examples are ordering Leatherman tools, mini-maglites, ping pong tables, sofas, and other nice to have items.

5.9.5 Do Not Exceed Call Limitations. All decentralized calls have a maximum call limitation of \$2,500 per transaction for persons other than the contracting officer. No individual call may exceed the call limitation listed in the BPA and the Ordering Officers Appointment Letter signed by a CCO. Contracting officers may place calls up to \$200,000 per transaction; therefore if you have a requirement above your call limitation, contact your contracting officer so they may place the call for you. (*NO OO WILL PLACE CALLS OVER \$2,500. ALL CALLS OVER \$2,500 MUST GO TO THE CONTRACTING OFFICER.*)

5.9.6 Do Not Split Requirements. The splitting of requirements to stay within the call limitation is prohibited. Calls placed above your call limit is considered an unauthorized action and the person placing the call could be held liable to pay for the call and received administrative or punitive action. A couple of examples of splitting requirements are;

- You received a requirement to procure items off of your BPA, and the total cost is \$3,500. You decide to place two calls, one for \$2,000 and the other for \$1,500, to procure the needed items. This is considered splitting requirements. *(In this case you should have contacted your contracting officer to place the call for you).*
- Another example of what may be viewed as splitting requirements is you receive a requirement at 0900 in the morning to procure items off of your BPA costing \$2,200. You place the call at 1000 that morning. The same day at 1300 in the afternoon, you receive another requirement to procure items off the same BPA totaling \$1,500. If you place the call it could be viewed as splitting requirements and might require a memo for record to document the situation. *(The best course of action to take if this occurs is to contact your contracting officer for advice on how to proceed.)*

5.9.7 Place The Call To The Vendor. If possible, FAX the call sheet to the vendor. If not, then telephone the order in or place the order in person. Once the call has been placed with the vendor, the vendor is obligated to perform IAW the terms and conditions of the BPA. The conditions include providing the type and quantity of supplies or services identified on the call sheet and delivery as required in the basic BPA.

5.9.8 Log In The Call On The Monthly Call Register. Immediately after placing the call log it in on the Monthly Call Register (see atch 13). You shall log all calls this form to ensure funds are tracked and an accurate record of purchases are maintained.

5.9.8.1 Monthly Call Register. Monthly BPA registers shall be used as the official log of all calls placed against your BPA for each Month. The

Monthly Call Register is an Excel Spread Sheet identifying, call numbers, ordering officer, number of line items order, total price for each call, and the dollar balance of your account. A separate sheet will be maintained for each month. On the first day of each month, the previous months log will be reviewed by the unit commander/equivalent, signed and submitted to the CCO no later than the 5th day of the month, along with the Monthly Report and Receiving Reports. If no calls were placed during the month it must be annotated on the Monthly Call Register and still submitted for review. All items will be correctly filled out or the form will be returned by the CCO.

5.9.8.1.1 Call Register Numbering System. Each call placed shall be consecutively numbered. The numbering system will be assigned by your CCO depending on the number of customers assigned to a particular BPA. An example of a call number is "B001", the B identifies the squadron using the BPA and the 001 identifies the first call placed on that BPA from that organization. Call numbers shall run consecutively from the start of the BPA until its expiration or cancellation regardless of fiscal years.

5.9.8.1.2 Call Transaction. Each call will be a single transaction. Calls should be based on a single Call Sheet. Each Call Sheet may consist of numerous line items. For example, you could call in a single order for 190 different items as long as you do not exceed the \$2500 total transaction threshold.

5.9.9 Inspection, Receipt and Acceptance, and Vendor Performance. You are responsible for ensuring that the services required are what you requested, receipted for, and that the vendor's performance has met the standards established in the Statement of Work.

5.9.9.1 Inspection. After you have placed your call the vendor will begin performance and deliver the goods or services requested. Upon delivery it is your responsibility to ensure what was ordered on your call sheet is exactly what is being delivered. Inspection is accomplished by physically verifying the call sheet to the items delivered to ensure the government is getting what it is paying for. You must ensure that each delivery matches your call precisely. *IF THE DELIVERY DOESN'T MATCH THE CALL SHEET, DON'T RECEIVE IT, UNLESS THERE*

WILL BE A MISSION IMPAIRMENT. THE SUPPLIER WILL ONLY BE PAID FOR CALLS THAT HAVE BEEN DELIVERED, NOT FOR CALLS PLACED.

5.9.9.2 Receipt and Acceptance. After inspecting the goods or services, the vendor will want a delivery ticket or invoice signed to verify that the goods or services were delivered. (THE PERSON PLACING THE CALL SHALL NOT RECEIPT FOR THE GOODS OR SERVICES RECEIVED). Ensure that you get a copy of the delivery ticket/invoice for your files as you will need this to pay the vendor. Acceptance of the vendor's work shall be documented on a delivery ticket provided by the vendor. Delivery tickets from the vendor will include name of company, BPA number, call number, date of call, itemized list of items, quantity, unit price and total price. After acceptance of the goods or services the OO shall mark the call as completed on the Monthly Call Register.

5.9.9.3 Vendor Performance. You are responsible for ensuring that the services required are received and that the vendor's performance has met the standards established in the SOW. Unacceptable performance shall be documented and the Contracting Officer notified. Upon notification of unacceptable performance, the CCO shall make a determination to accept the goods or services or have the vendor re-accomplish the work. Any disputes between you and the vendor shall be forwarded to the CCO for a decision. Acceptance of the vendor's work shall be documented on a delivery ticket provided by the vendor. The person placing the call shall accomplish all follow-up actions with the vendor. The follow-up actions shall be documented and made a part of your file in TAB E (CORRESPONDENCE). If a vendor is consistently delinquent or is providing substandard service notify the CCO immediately so corrective action can be taken.

5.9.10 Invoices and Payment. The invoicing and payment process actually begins with the receipt of deliveries. The supplier will submit no less than monthly invoices directly to you. If you don't receive

an invoice each month you need to immediately contact the supplier and request one. If they don't provide it right away, or always have to be prompted, you need to notify your CCO.

5.9.10.1 Invoices. In most cases, the supplier sends their invoice directly to you. The invoice shall identify the goods/services received (in detail with item numbers), along with the call number, who placed the call, who receipted for the call, and copies of delivery tickets. If the invoice does not have the call number identified then the OO will write-in the number. Timely handling of the vendor's invoice is critical. You must work invoices as soon as they're received. Delays could result in late payments and additional costs to the government. (EACH ITEM ON AN INVOICE MUST BE CHECKED TO ENSURE THE CORRECT PRICE IS LISTED FROM THE APPROVED PRICE LIST.)

5.9.10.2 Payment To The Vendor. The BPA Ordering Officer is responsible to ensure that the vendor receives payment. Payment to the vendor is accomplished after receipt and verification of the vendor's invoice.

5.9.10.2.1 Certify Each Invoice. After a complete review of the invoice, the OO shall certify the invoice for payment by typing or printing the following statement on the invoice, then sign and date the statement.

"I certify that all goods/services have been received, accepted and that all items for which the vendor request payment are on the Approved Price List."

Printed Name/Title/Signature/Date

5.9.10.2.2 Fill Out Receiving Report And Submit To Finance Office. You have to fill out a Monthly Invoice Receiving Report (see atch 15) and submit this report along with the related invoice(s) and a copy of the Monthly Call Register which covers the invoices, to the Finance Office for payment. Send a copy of each Monthly Receiving Report to your CCO.

5.9.11 Monthly Reporting. The first day of each month, you must report to your CCO how much you

used on the BPA. The Monthly Unit BPA Report (see atch 16) is mandatory and shall be signed by the unit commander. To report, simply total the number of calls (actions) and how many line items were on all of those calls. Add up the total dollar value of all the calls you placed during the month and turn in the information to the CCO along with a copy of the call register. If for some reason, you didn't use your BPA during a given month, you must still submit a negative report, so we'll know you didn't just forget to send a report. Be sure to meet your CCO's suspense for turning in your report each month. Normally, the report must be submitted no later than the fifth day of each new month. The BPA Monthly Report is based on four numbers obtained from your Monthly Call Register.

- How many dollars were spent for the month. This number is automatically added on your Monthly BPA register.
 - This is self explanatory. You add up all funds expended on that BPA for the month.
- How many actions occurred for the month. This number is automatically added on your Monthly BPA register.
 - Actions are how many calls were placed against your BPA. This number is automatically added on your Monthly BPA register.
- How many line items were ordered for the month. This number is automatically added on your Monthly BPA register.
 - Line items are the total number of line items used on each call, added to each other for a total for the month.
- How many dollars have been expended for the year. This number is automatically added on your Monthly BPA register.

5.9.12 CCO Monthly Review. The CCO will schedule an appointment once a month to review your BPA program. These reviews aren't intended to harass you, its to ensure the rights of the government are protected and that you're properly administering your BPA.

5.9.12.1 Review Checklist. The contracting officer shall conduct a monthly inspection of all BPAs. This inspection shall be conducted using the Monthly CCO Review Checklist (see atch 17 and 17a) Results of inspections shall be documented and forwarded to appropriate unit commanders for action/replies. If severe findings are discovered the CCO may suspend all use of that BPA until deficiencies are corrected.

5.10 GETTING STARTED. Okay, you've requested a BPA and it's completed with funding. You have been appointed by your commander, set-up your BPA File, attended training and have your Ordering Officer Appointment Letter. So now your are ready to start placing calls against your new BPA. Before you start though, a few final words of advice listed below.

5.10.1 Misuse or Abuse of a BPA: Misuse or abuse of this agreement shall result in administrative or judicial action against the violator and possibly cancellation of the BPA. The main rules to remember are:

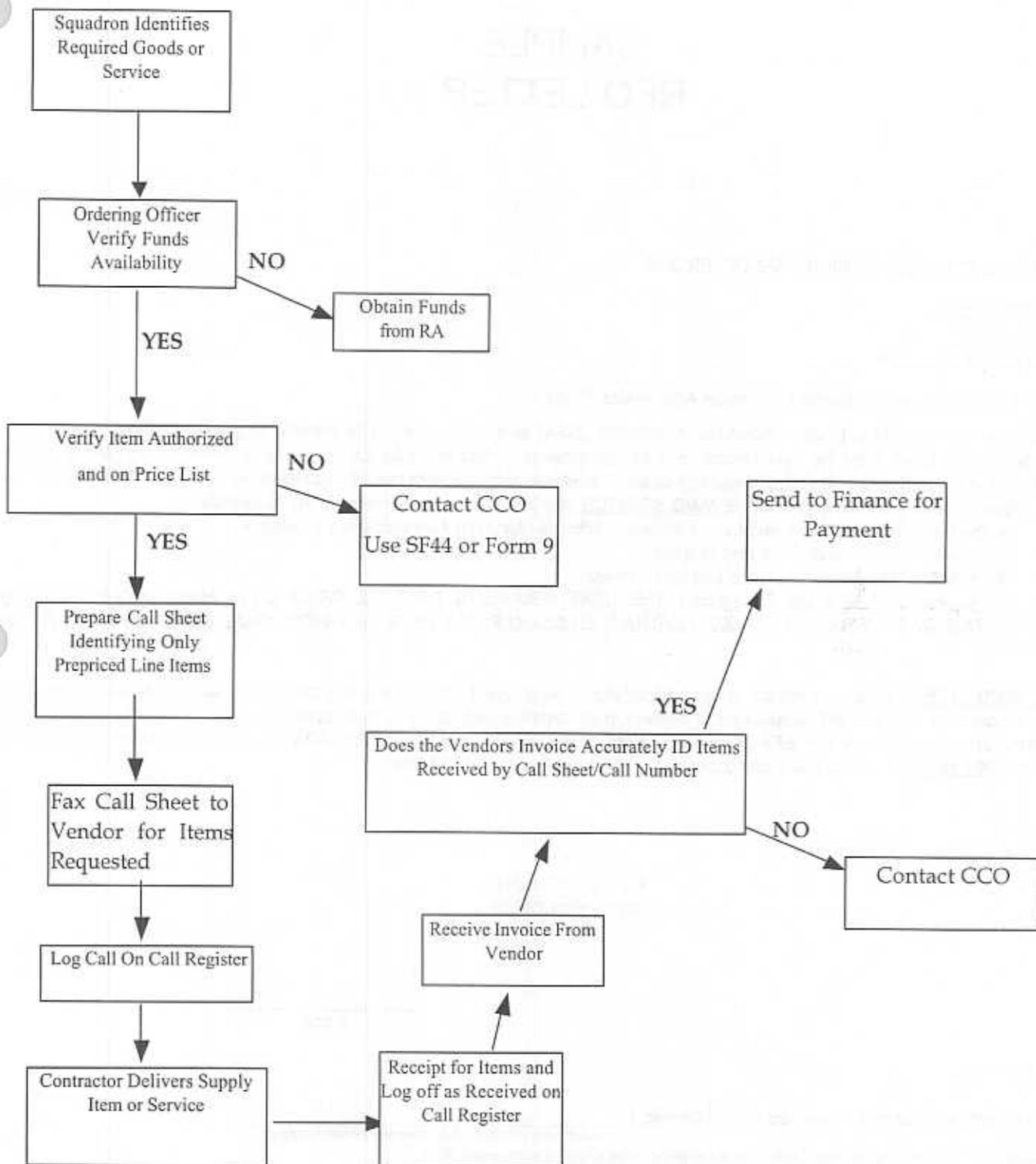
- *NO CALL SHALL BE PLACED UNLESS FUNDS HAVE BEEN MADE AVAILABLE AND ARE AVAILABLE AT THE TIME THE CALL WAS PLACED.*
- *NO CALL SHALL BE PLACED BY AN UNAUTHORIZED PERSON. AN UNAUTHORIZED PERSON IS ONE NOT APPOINTED BY A CONTRACTING OFFICER.*
- *NO CALL SHALL BE PLACED FOR AN ITEM NOT ON THE PRE-APPROVED PRICE LIST.*

- *NO CALL SHALL BE PLACED FOR GOODS OR SERVICES THAT WILL EXCEED THE DOLLAR THRESHOLD CALL LIMITATION.*
- *SPLITTING OF REQUIREMENTS TO STAY WITHIN THE CALL LIMITATION IS PROHIBITED.*
- *CALL REGISTERS SHALL BE MAINTAINED CORRECTLY AND FORWARDED TO THE CCO MONTHLY.*
- *DO NOT PLACE CALLS FOR ITEMS CONSIDERED EXTRAVAGANTLY HIGH.*

PRICES ARE EVERYONES RESPONSIBILITY. TALK TO YOUR CCO FOR ALTERNATIVE SOLUTIONS.

5.11 CCO ASSISTANCE. Finally, your CCO is there to provide assistance for you. The whole purpose for giving you a BPA is to help you accomplish your mission. The CCO can answer questions for you and help with your larger purchases. Immediately call your CCO if you're not sure about something. We are here to help.

BPA ORDERING PROCESS



SAMPLE RFQ LETTER

3-Oct-03

MEMORANDUM FOR ALL PROSPECTIVE OFFERORS

FROM: 4409 LS/LGC
Villa A-22
Eskan Village, KSA

SUBJECT: Establishing a new Blanket Purchase Agreement (BPA)

1. We propose to establish a Blanket Purchase Agreement (BPA) with your company to provide **SEWING SERVICE**. A BPA is not a binding contract, they are agreements, and as agreements, prices must be set prior to any orders being placed against the BPA. Please review the attached statement of work, clauses, and complete the all shaded areas on the STANDARD FORM 1449. Please provide a price list for all **SEWING SERVICE** that you can supply. The price list must indicate:
 - A line item number or part number for easy identification for each item that you can supply
 - A price for each item and the unit of issue
 - An effective date when the Price List takes effect
 - An expiration date of the Price List. (THE USAF REQUESTS THAT ALL PRICE LISTS HAVE A ONE (1) YEAR EFFECTIVE DATE. PRICES PROVIDED SHOULD BE GOOD FOR 1 YEAR OR WHEN DESIGNATED ON YOUR PRICE LIST).

1. As **SEWING SERVICES** are required, an authorized Purchasing Agent or a Contracting Officer will place calls against the pre-approved price list and you will be required to perform in accordance with all terms and conditions of the BPA. If you agree with the terms and conditions of the BPA please complete all documents concerning this BPA and return no later than close of business **25 Feb 1998**. If you have any questions, please contact me at 498-8891.

F.J. NICKERSON
Contracting Officer

DATE

TO: 4409 LS/LGC

On behalf of the above mentioned establishment, I _____
PRINT NAME OF AUTHORIZED COMPANY REPRESENTATIVE
agree/disagree on the conditions set forth in establishing the above mentioned BPA.

SIGNATURE AND DATE

ATTACHMENT 2

SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS <i>OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, AND 30</i>				1. REQUISITION NUMBER		PAGE 1 OF	
2. CONTRACT NO. F38604-98-AR		3. AWARD/EFFECTIVE DATE		4. ORDER NUMBER		5. SOLICITATION NUMBER	
7. FOR SOLICITATION INFORMATION CALL: ➤		a. NAME Nick Nickerson				b. TELEPHONE NUMBER (No collect calls) 498-8891	
9. ISSUED BY OPERATIONAL CONTRACTING 4409 LS/LGC VILLA A-22 (ESKAN VILLAGE) RIYADH, KSA P.O.C.: Nick Nickerson TEL NO.: 011-066-1-498-8891 FAX NO.: 011-066-1498-8894		CODE		10. THIS ACQUISITION IS <input type="checkbox"/> UNRESTRICTED <input type="checkbox"/> SET ASIDE: % FOR <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> SMALL DISADV. BUSINESS <input type="checkbox"/> (A) SIC: SIZE STANDARD:		11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE <input type="checkbox"/> 13a. THIS CONTRACT IS A RATIO ORDER UNDER DPAS (15 CFR 700) 13b. RATING 14. METHOD OF SOLICITATION <input checked="" type="checkbox"/> RFQ <input type="checkbox"/> IFB <input type="checkbox"/> RFP	
6. SOLICITATION ISSUE DATE 13 January, 1998		12. DISCOUNT TERMS NET 30		15. DELIVER TO 4409th ABG/SG Hospital Villa 68-13 Eskan Village, KSA For Escort Contact 488-8225			
17a. CONTRACTOR/OFFEROR Name And Address		CODE		FACILITY CODE		16. ADMINISTERED BY: SEE BLOCK 9	
TELEPHONE NO.		FAX NO.		18a. PAYMENT WILL BE MADE BY ACCOUNTING AND FINANCE 4409 ABG/FMFS VILLA A-12, (ESKAN VILLAGE) RIYADH, KSA			
<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER				18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM			
19. ITEM NO.		20. SCHEDULE OF SUPPLIES/SERVICES		21. QUANTITY		22. UNIT	
23. UNIT PRICE		24. AMOUNT		SEE ATTACHED PRICE LIST			
0001		BLANKET PURCHASE AGREEMENT FOR <u>LAUNDRY SERVICES</u> AS IDENTIFIED IN THE PRICE LIST. *****LAST ITEM*****					
(Attach Additional Sheets as Necessary)							
25. ACCOUNTING AND APPROPRIATION DATA IDENTIFIED ON AF FORM 9 OR AF FOR 616 BY USING ORGANIZATION						26. TOTAL AWARD AMOUNT (For Gov's Use Only) I.D. ON INDIVIDUAL CALLS	
<input type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4, FAR 52.212-3 AND 52.212-5 ARE ATTACHED, ADDENDA <input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED						<input type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATED BY REFERENCE FAR 52.212-4, FAR 52.212-5 IS ATTACHED, ADDENDA <input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED	
28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN <u>ALL</u> COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED HEREIN.				28. AWARD OF CONTRACT: REFERENCE _____ OFFER DATED _____ YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS: <input type="checkbox"/>			
30a. SIGNATURE OF OFFEROR/CONTRACTOR				31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER)			
30b. NAME AND TITLE OF SIGNER (TYPE OR PRINT)		30c. DATE SIGNED		31b. NAME OF CONTRACTING OFFICER (TYPE OR PRINT) F.J. NICKERSON		31c. DATE SIGNED	
32. QUANTITY IN COLUMN 21 HAS BEEN <input type="checkbox"/> RECEIVED <input type="checkbox"/> INSPECTED <input type="checkbox"/> ACCEPTED AND CONFORMS TO THE				33. SHIP NUMBER		34. VOUCHER NUMBER	
				35. AMOUNT VERIFIED CORRECT FOR			

ORIGINAL RECEIVED		PAYIN	FINAL	
32b. SIGNATURE OF AUTHORIZED GOVT. REPRESENTATIVE	32c. DATE	36. PAYMENT [] COMPLETE [] PARTIAL [] FINAL		37. CHECK NUMBER
41a. I CERTIFY THIS ACCOUNT IS CORRECT AND PROPER FOR PAYMENT		38. S/R ACCOUNT NUMBER	39. S/R VOUCHER NUMBER	40. PAID BY
41b. SIGNATURE AND TITLE OF CERTIFYING OFFICER		42a. RECEIVED BY (Print)		
41c. DATE		42b. RECEIVED AT (Location)		
		42c. DATE REC'D (YY/MM/DD)	42d. TOTAL CONTAINERS	

AUTHORIZED FOR LOCAL REPRODUCTION

STANDARD FORM 1449 (10-95)

SAMPLE SF 1449

ATTACHMENT 3

SAMPLE BPA SCHEDULE

THE SCHEDULE

1. **DESCRIPTION OF AGREEMENT** - The supplier shall furnish supplies or services, if and when requested by the Contracting Officer (or the authorized representative of the Contracting Officer). **SERVICES/SUPPLIES** to be furnished: Contractor is to provide all transportation, plant, labor, materials and equipment to clean villas located at Eskan Village in support of the Area or Responsibility (AOR) units in The Kingdom of Saudi Arabia in accordance with the attached statement of work/Performance Work Statement and the Pre-Approved Price List. Period of performance for subject Blanket Purchase Agreement (BPA) is indefinite.
2. **EXTENT OF OBLIGATION:** The Government is only obligated to the extent of authorized calls actually placed against this BPA by authorized personnel, against authorized line items
3. **PRICING** - The prices charged the United States Government shall be as low as those charged the supplier's most favored customer for comparable quantities under similar terms and conditions. .
4. **PURCHASE LIMITATION** - The limitation for each individual purchase under this BPA shall be identified by a authorization letter. The authorization letter will identify the persons name, rank, unit and maximum call limitation. The Contracting Officer may place a call up to \$200,000.00 US / 53,333.33 SR under this BPA.
5. **NOTICE OF INDIVIDUALS AUTHORIZED TO PURCHASE UNDER THE BPA AND DOLLAR LIMITATIONS BY TITLE OF POSITION OR NAME** - A list of individuals authorized to purchase under the BPA, identified either by title of position, or by name of the individual, or by organizational component, and the limitation purchase for each position title or individual, shall be furnished to the supplier by the Contracting Officer.
6. **METHOD OF PLACING CALLS:** Calls against this agreement will generally be made orally or by electronic means, (FAX) if convenient.
7. **COMPLETION DATE FOR CALLS:** The completion date for calls will be established at the time a call is placed with the contractor unless delivery terms are specified by the contractor in addition to his pricing.
8. **DELIVERY TICKETS** - All Shipments under this agreement shall be accompanied by delivery tickets or sales slips which shall contain the following minimum information:

- a. Name of supplier
- b. BPA Number
- c. Date of purchase
- d. Call number
- e. Itemized list of supplies or services furnished identified by line item number.
- f. Quantity, unit price, and extension of each item, less applicable discounts.
- g. Date of delivery or shipment
- h. Person Placing the Call

ATTACHMENT 4

9. **INVOICES** - A Summary invoice shall be submitted at least monthly or upon expiration of this BPA, whichever occurs first, for all deliveries made during a billing period. The invoice shall identify the delivery tickets covered therein, stating their total amount, and supported by receipted copies of the delivery tickets. The invoice shall be submitted to the customer or the Contracting Office for review and payment.

10. **PAYMENTS** - Pursuant to paragraph 9, entitled "INVOICES", payment will be made monthly on all calls placed by authorized personnel and completed by the vendor during the given period. Payment will be made in local currency by check or electronic funds transfer.

BILATERAL PURCHASE ORDER CLAUSES

17.	52.243-1	CHANGES-FIXED-PRICE (SUPPLIES)	AUG 1987
18. ()	52.245-1	PROPERTY RECORDS	APR 1984
19. ()	52.245-2	GOVERNMENT PROPERTY (FIXED PRICE CONTRACTS)	DEC 1989
all ()	52.245-4	GOVERNMENT FURNISHED PROPERTY (SHORT FORM)	APR 1984
21. ()	52.246-1	CONTRACTOR INSPECTION REQUIREMENTS	APR 1984
22.	52.246-2	INSPECTION OF SUPPLIES FIXED-PRICE	FEB 1992
23.	52.246-2	INSPECTION OF SERVICES FIXED-PRICE	FEB 1992
24.	52.246-16	RESPONSIBILITY FOR SUPPLIES	APR 1984
25. ()	52.247-29	F.O.B. ORIGIN	JUN 1988
26. ()		52.247.34	FOB DESTINATION
	JAN 1991		
27.	52.249-1	TERMINATION FOR CONVENIENCE OF THE GOVERNMENT (FIXED-PRICE, SHORT FORM)	APR 1984
27.	52.249-8	DEFAULT (FIXED-PRICE SUPPLY AND SERVICE)	APR 1984
28.	252.243-7001	PRICING OF CONTRACT MODIFICATIONS	DEC 1991

ATTACHMENT 5

**SAMPLE UNIT REQUEST LETTER
FOR
OO TRAINING AND APPOINTMENT**

A. \$2,500 maximum per call. No split purchases to avoid dollar threshold.		
B. No unauthorized purchases. Only order from approved price list.		
5. COMPLIANCE/ETHICS:		
A. Read and comply with ethics regulation (Previously AFR 30-30)		
B. Gratuities, gifts, lunches, and presents are NOT ALLOWED		
6. Challenge high priced items. Consider mission critical timing.		
7. Received copy of Procedures Guide		
Training on Blanket Purchase Agreement procedures and Ordering Official's responsibilities is hereby provided to the above mentioned individual on this date.		
CONTRACTING OFFICER NAME: F.J. NICKERSON, MSgt, USAF	SIGNATURE	DATE:
I hereby certify that I have received training on the above mentioned Blanket Purchase Agreement. I understand the proper procedures and the Ordering Official's responsibilities.		
ORDERING OFFICER/TRAINEE NAME:	SIGNATURE	DATE:

ATTACHMENT 7

SAMPLE ORDERING OFFICER APPOINTMENT LETTER

DEPARTMENT OF THE AIR FORCE
4409TH OPERATIONS GROUP (PROVISIONAL) (ACC)
APO Area Europe 09852-6200

February 4, 1998.

MEMORANDUM FOR 4409 ABG/PA

FROM: 4409 LS/LGC

SUBJECT: Appointment of Ordering Officer(s) for Blanket Purchase Agreement (BPA) Number F38604-98-AR007, Film Services

1. The following individuals are appointed Ordering Officer(s) and is/are authorized to place calls against subject BPA. They are the only 4409 PA unit individuals authorized to place calls. BPA call sequence number will begin with "B".

<u>RANK/NAME</u>	<u>UNIT/OFFICE SYMBOL</u>	<u>PHONE NUMBER</u>	<u>DEROS</u>
PRIMARY; 1LT John Smith	4409/PA	433-3333	20 May 98
ALTERNATE PA Mary Jones	4409/PA	433-4444	10 Jun 98

2. Ordering Officer's duties and responsibilities are as follows:

Signature Block
Commander

ATTACHMENT

6

BPA CERTIFICATION FORM

BPA TRAINING CERTIFICATION DOCUMENT				
BPA NUMBER:		BPA TITLE:		
ORDERING OFFICER'S PRINTED NAME & RANK:		UNIT ASSIGNED:	TEL & FAX NO.:	AOR DEROS:
ITEMS DISCUSSED AND UNDERSTOOD				INITIALS
1. SET UP FILES				
A. Standard File Index (required documents)				
B. Approved price list/Ordering Officer				
C. Approved list of authorized persons				
D. File will be reviewed monthly by contracting				
2. FUNDING				
A. Certified AF Form 9/AF 616				
2. MONTHLY CALL REGISTER:				
A. Check book concept.				
B. Understand procedures to assign and track call numbers Customer must use a new call number each time a new order is placed.				
3. ORDERING OFFICER PROCESS:				
A. List requirements on call sheet, place order, log call in, receive item,				
verify item and price, process invoice				
4. PROHIBITED PRACTICES:				

- a. Authorized to place calls up to SR 9,375.00/\$2,500, items over this amount require a contracting officer to place the order.
- b. Ensure items proposed for purchase are on the BPA price list and sufficient funds exist (Funding Document - AF Form 9, AF Form 616 or Funding Letter) to cover the total amount of the call.
- c. DO NOT SPLIT REQUIREMENTS to avoid exceeding your call limitation. All requirements received for a given day should be placed under one call number. In the event you have to place another call the same day you shall contact the contracting office for directions.
- d. You are required to prepare and maintain a call register for each month. Call registers shall include; call number, date of call, name of person placing call, total number of line items, total Riyals (SR) and total dollars, and a cumulative balance of Riyals (SR) and dollars. (Note: Call numbers are consecutively numbered throughout the life of the BPA).
- e. You are required to submit a monthly report signed by your unit commander with your call register to the Contracting Office no later than the FIFTH DAY OF EACH MONTH for the previous month.
- f. This letter supersedes all previous appointment letters. Direct any questions you may have to me at 498-8891.

F.J. NICKERSON, MSgt, USAF
Contracting Officer

ATTACHMENT 8

**SAMPLE
NOTIFICATION LETTER TO CONTRACTOR
FOR PERSONNEL
AUTHORIZED TO PLACE CALLS**

**DEPARTMENT OF THE AIR FORCE
4409TH OPERATIONS GROUP (PROVISIONAL) (ACC)
APO Area Europe 09852-6200**

February 4, 1998

MEMORANDUM FOR XYZ Company

FROM: 4409 LS/LGC

SUBJECT: Appointment of Ordering Officer(s) for Blanket Purchase Agreement (BPA) Number
F38604-98-AR007, Film Services

1. The following individuals are authorized to place orders with your company under subject BPA. They are the only government individual authorized to place calls.

<u>RANK/NAME</u>	<u>UNIT OFFICE SYMBOL</u>	<u>PHONE NUMBER</u>	<u>CALL DEROS</u>	<u>CALL LIMIT</u>
CONTRACTING OFFICER				
Contingency Contracting Officer	4409/LGC	433-5555	1 Apr 98	750,000 (SR)
PRIMARY:				
1LT John Smith	4409/PA	433-3333	20 May 98	9,375 (SR)
ALTERNATE				
SRA Mary Jones	4409/PA	433-4444	10 Jun 98	9,375 (SR)

- Only items from your approved Price List will be ordered.
- If calls are accepted from other individuals and items ordered that are not on the approved Price List then these items will not be paid for.
- This letter supersedes all previous appointment letters. Direct any questions you may have to me at 498-8891.

F.J. NICKERSON, MSgt, USAF
Contracting Officer

ATTACHMENT 9

SAMPLE CCO SIX PART FILE INDEX

<u>TAB A—BASIC DOCUMENTS</u>		<u>TAB D—POST AWARD ACTIONS</u>	
1	Funding Document/Purchase Request (AF Form 616 or AF Form 29)	1	BPA Call Registers/ Monthly BPA Reports (Customer Calls #B)
2	Source List	2	BPA Call Registers/ Monthly BPA Reports
3	RFQ		
4	Unsuccessful Quotes	3	BPA Call Registers/ Monthly BPA Reports
5	Determinations and Findings (all times)		
6	Distribution Record		
<u>TAB R—RPA/APPROVED PRICE LIST</u>		<u>TAB E—INSPECTIONS</u>	
1	Blanket Purchase Agreement	1	Monthly Inspection of Customer R#
2	Modifications	2	Monthly Inspection of Customer C#
3	Ordering Officers Appointment Letter	3	
4	Letter to Contractor on Approved Price List/Persons	4	
5	Price List	5	
<u>TAB C—TRAINING</u>		<u>TAB F—CORRESPONDENCE & MISC</u>	
1	Using Organization Appointment Letter	1	
2	Customer Training Document	2	
3	Decentralized Letter of Instruction for RPAs	3	

SAMPLE WING/SQDN/EQUIVALENT BPA INDEX

WING/SQDN BPA FILE INDEX				
ACCOUNT NUMBER: F38604- -			TITLE:	
Points of Contact				
RANK	NAME	POSITION	PHONE	DEROS
TAB A (FUNDING DOCUMENTS)				
1	CUSTOMER REQUEST			
2	FUNDING DOCUMENT			
3	ANNUAL TRACKER FOR FUNDS			
TAB B (PRICE LIST/PRICING/BPA DOCUMENTS)				
1	CONTRACTOR NOTIFICATION LTR.			
2	ORDERING OFFICERS APPOINTMENT LTR.			
3	BLANKET PURCHASE AGREEMENT			
4	MODIFICATIONS			
5	PRICE LIST			
TAB C (TRAINING/INSPECTIONS)				
1	TRAINING REQUEST/TRAINING CERTIFICATIONS)			
2	BPA TRAINING GUIDE			
3	BPA DECENTRALIZED INSTRUCTION LETTER			
4	SELF INSPECTION CHECKLIST			
5	MONTHLY INSPECTION REPORTS/REPLIES			
6	RANDOM INSPECTION REPORT/REPLIES			
TAB D (BPA ACTIONS)				
1	MONTHLY BPA CALL REGISTER/REPORT (DECENTRALIZED) CALL # B			
2	CALL SHEETS, SEPARATED BY MONTH, WITH COPY OF INVOICE ATTACHED			
TAB E (MISCELLANEOUS)				

1	CORRESPONDENCE		
2			

ATTACHMENT 11

CCO BPA DOCUMENT DISTRIBUTION

BPA#:		Proj Title:				
Customer:			Company:			
POC:			Poc:			
Phone #:			Phone #:			
CONTRACT DISTRIBUTED		MOD#1	MOD#2	MOD#3	MOD#4	MOD#5
COPY TO	DATE and INITIALS	DATE DISTRO				
File (Original)						
KTR (1 Copy)						
Finance (2 copies)						
User (1 copy)						
	MOD#6	MOD#7	MOD#8	MOD#9	MOD#10	MOD#11
COPY TO	DATE DISTRO	DATE DISTRO	DATE DISTRO	DATE DISTRO	DATE DISTRO	DATE DISTRO
File (Original)						
KTR (1 Copy)						
Finance (2 copies)						
User (1 copy)						

FOOTING

SECTION
C-1000000

NO.	DESCRIPTION	QTY	UNIT	AMOUNT
1	FOOTING	1.00	CU YD	1.00
2	FOOTING	1.00	CU YD	1.00
3	FOOTING	1.00	CU YD	1.00
4	FOOTING	1.00	CU YD	1.00
5	FOOTING	1.00	CU YD	1.00
6	FOOTING	1.00	CU YD	1.00
7	FOOTING	1.00	CU YD	1.00
8	FOOTING	1.00	CU YD	1.00
9	FOOTING	1.00	CU YD	1.00
10	FOOTING	1.00	CU YD	1.00
11	FOOTING	1.00	CU YD	1.00
12	FOOTING	1.00	CU YD	1.00
13	FOOTING	1.00	CU YD	1.00
14	FOOTING	1.00	CU YD	1.00
15	FOOTING	1.00	CU YD	1.00
16	FOOTING	1.00	CU YD	1.00
17	FOOTING	1.00	CU YD	1.00
18	FOOTING	1.00	CU YD	1.00
19	FOOTING	1.00	CU YD	1.00
20	FOOTING	1.00	CU YD	1.00
21	FOOTING	1.00	CU YD	1.00
22	FOOTING	1.00	CU YD	1.00
23	FOOTING	1.00	CU YD	1.00
24	FOOTING	1.00	CU YD	1.00
25	FOOTING	1.00	CU YD	1.00
26	FOOTING	1.00	CU YD	1.00
27	FOOTING	1.00	CU YD	1.00
28	FOOTING	1.00	CU YD	1.00
29	FOOTING	1.00	CU YD	1.00
30	FOOTING	1.00	CU YD	1.00
31	FOOTING	1.00	CU YD	1.00
32	FOOTING	1.00	CU YD	1.00
33	FOOTING	1.00	CU YD	1.00
34	FOOTING	1.00	CU YD	1.00
35	FOOTING	1.00	CU YD	1.00
36	FOOTING	1.00	CU YD	1.00
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38	FOOTING	1.00	CU YD	1.00
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41	FOOTING	1.00	CU YD	1.00
42	FOOTING	1.00	CU YD	1.00
43	FOOTING	1.00	CU YD	1.00
44	FOOTING	1.00	CU YD	1.00
45	FOOTING	1.00	CU YD	1.00
46	FOOTING	1.00	CU YD	1.00
47	FOOTING	1.00	CU YD	1.00
48	FOOTING	1.00	CU YD	1.00
49	FOOTING	1.00	CU YD	1.00
50	FOOTING	1.00	CU YD	1.00
51	FOOTING	1.00	CU YD	1.00
52	FOOTING	1.00	CU YD	1.00
53	FOOTING	1.00	CU YD	1.00
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61	FOOTING	1.00	CU YD	1.00
62	FOOTING	1.00	CU YD	1.00
63	FOOTING	1.00	CU YD	1.00
64	FOOTING	1.00	CU YD	1.00
65	FOOTING	1.00	CU YD	1.00
66	FOOTING	1.00	CU YD	1.00
67	FOOTING	1.00	CU YD	1.00
68	FOOTING	1.00	CU YD	1.00
69	FOOTING	1.00	CU YD	1.00
70	FOOTING	1.00	CU YD	1.00
71	FOOTING	1.00	CU YD	1.00
72	FOOTING	1.00	CU YD	1.00
73	FOOTING	1.00	CU YD	1.00
74	FOOTING	1.00	CU YD	1.00
75	FOOTING	1.00	CU YD	1.00
76	FOOTING	1.00	CU YD	1.00
77	FOOTING	1.00	CU YD	1.00
78	FOOTING	1.00	CU YD	1.00
79	FOOTING	1.00	CU YD	1.00
80	FOOTING	1.00	CU YD	1.00
81	FOOTING	1.00	CU YD	1.00
82	FOOTING	1.00	CU YD	1.00
83	FOOTING	1.00	CU YD	1.00
84	FOOTING	1.00	CU YD	1.00
85	FOOTING	1.00	CU YD	1.00
86	FOOTING	1.00	CU YD	1.00
87	FOOTING	1.00	CU YD	1.00
88	FOOTING	1.00	CU YD	1.00
89	FOOTING	1.00	CU YD	1.00
90	FOOTING	1.00	CU YD	1.00
91	FOOTING	1.00	CU YD	1.00
92	FOOTING	1.00	CU YD	1.00
93	FOOTING	1.00	CU YD	1.00
94	FOOTING	1.00	CU YD	1.00
95	FOOTING	1.00	CU YD	1.00
96	FOOTING	1.00	CU YD	1.00
97	FOOTING	1.00	CU YD	1.00
98	FOOTING	1.00	CU YD	1.00
99	FOOTING	1.00	CU YD	1.00
100	FOOTING	1.00	CU YD	1.00

SAMPLE CALL SHEET

BLANKET PURCHASE AGREEMENT "CALL SHEET" BPA NUMBER: F32604-98-AR005

CALL NUMBER:	A001		ORGANIZATION:
DATE OF CALL:	17-Dec-97		VENDOR NAME:
AUTHORIZED PERSON PLACING THE CALL:			MSgt F.J. Nickerson, Contracting Officer

LINE ITEM #	ITEM DESCRIPTION (IF APPLICABLE)	QNTY	ORDRED	EXTENDED PRICE S.R.	UNIT PRICE U.S.	EXTENDED PRICE U.S.
0317	PVC Pipe 4"	4	100	400	\$26.67	\$106.68
0024	Repair VCR	1	125	125	\$33.33	\$33.33
0103	8 Piece Socket Set	10	75	750	\$20.00	\$200.00
0644	Clean One Villa in 6 Story High Rise	1	2812.5	2812.5	\$750.00	\$750.00
				0	\$0.00	\$0.00
		0	0	0	\$0.00	\$0.00
		0	0	0	\$0.00	\$0.00
		0	0	0	\$0.00	\$0.00
TOTALS:			3112.5	4087.5	\$830.00	\$1,090.01

I hereby certify that this call was placed using the approved price list signed by a Contracting Officer, and that all items ordered are for our organizations mission. Furthermore I certify that no items were ordered that were not on the approved price list.

DATE
RECEIVED:

Signature of Authorized Person Placing
Call

ATTACHMENT 14

SAMPLE INVOICE RECEIVING REPORT LETTER

DEPARTMENT OF THE AIR FORCE
4409TH OPERATIONS GROUP (PROVISIONAL) (ACC)
APO Area Europe 09852-6200

January 31, 1998

MEMORANDUM FOR 4409/FM

FROM: 4409 ABG/PA

SUBJECT: Receiving Report for Blanket Purchase Agreement (BPA) Number F38604-98-AR007, Film Services

1. This is to certify that the following supplies/services ordered on the subject BPA were received and accepted. Contractor's performance was satisfactory unless noted in paragraph 2 below. Prices invoiced were the same as on the Approved Price List.

<u>INVOICE NUMBER</u>	<u>DATE OF INVOICE</u>	<u>TOTAL INVOICE SAUDI RIYALS</u>	<u>TOTAL INVOICE DOLLARS</u>	<u>CALL NUMBERS</u>	<u>DATE OF CALL</u>
73456	25 Jan 98	1000	\$266.67	B117	15 Jan 98
				B118	17 Jan 98
				B120	20 Jan 98
72223	13 Jan 98	775	\$206.67	B110	9 Jan 98

2. The following discrepancies were noted:
- a. Call # _____ Discrepancie _____
Amount to be withheld _____
 - b. Call # _____ Discrepancie _____
Amount to be withheld _____
 - c. Call # _____ Discrepancie _____
Amount to be withheld _____
 - d. Call # _____ Discrepancie _____
Amount to be withheld _____

3. Unless noted above the contractor invoice should be paid in full. Direct any questions you may have to me at 498-8891.

3 Atchs
2 Invoices w/delivery tickets
Jan 98 Monthly Call Register
CC: CCO w/o Atchs

Signature Block
4409/PA Commander/Equivalent

ATTACHMENT 15

SAMPLE MONTHLY UNIT BPA REPORT

DEPARTMENT OF THE AIR FORCE
4409TH AIR BASE GROUP (PROVISIONAL) (ACC)
APO Area Europe 09852-6200

November 5, 1997

MEMORANDUM FOR 4409 LS/LGC

FORM: ORGANIZATION/CC

SUBJECT: BPA F38604-98-AR001, Report for the Month of Sep 1998

1. The following is the monthly report for BPA F38604-98-_____ from (Organization)

a. BPA Monitors:

<u>POSITION</u>	<u>RANK</u>	<u>NAME</u>	<u>DEROS</u>
Primary OO	MSgt	John M. Money	10 Jan 98
Alternate OO SRA		Dave S. Ours	12 Feb 98

b. NUMBER OF CALLS FOR THE MONTH OF SEP 1998: _____

c. NUMBER OF LINE ITEMS FOR THE MONTH OF SEP 1998: _____

d. TOTAL DOLLAR AMOUNT EXPENDED FOR THE MONTH OF SEP 1998: _____

e. TOTAL DOLLAR AMOUNT EXPENDED FOR FISCAL YEAR 1998: _____

2. Certification:

I the undersigned hereby certify that the above information is true and correct and that all goods/services identified on attached call register have been ordered IAW applicable FAR and Local requirements.

I Attach:

1. Call Register for the Month of Sep 1998

JOHN M. SPEND, Lt. Col., USAF
Commander:

ATTACHMENT 16

SAMPLE MONTHLY REVIEW CHECKLIST

MONTHLY CCO REVIEW CHECKLIST		PAGE <u>1</u> OF <u>2</u> PAGES		
TITLE/SUBJECT/ACTIVITY/FUNCTIONAL AREA		OPR	DATE	
MONTHLY REVIEW OF USER'S BLANKET		4409 th	1 Dec 97	
PURCHASE AGREEMENTS (BPAs)		LS/LGC		
NO.	ITEM	YES	NO	N/A
	BPA FILES			
1.	Does the BPA folder contain required documents per the Index? (a) Approved funding documents? (b) Current Price List? (c) Copy of all Call Sheets with invoices attached?			
2.	Was the BPA Call Register correctly filled out? (a) Was name of person placing calls identified? Are they authorized? (b) Was a declining balance calculated after each call to identify funding balance? (c) Do Call Sheets track to each call? (d) Was register signed by Squadron commander/equivalent?			
3.	Prohibited practices (a) Were any calls place over the call limitations (max \$2500)? (b) Were calls split to avoid dollar thresholds? (c) Were any items purchased not on the Price List? (1) Were items purchased which were outside scope of BPA? (d) Were any calls placed when there was no money in the account? (e) Were any high prices paid for items (such as \$600 ping pong tables, \$100 mini-maglites)?			
4.	Receipt of goods and services			
	(a) Were goods and services received by persons other than the ordering officer?			
	(b) Were goods and services verified before receipt, including price?			
REMARKS				

ATTACHMENT 17

MONTHLY CCO REVIEW CHECKLIST		PAGE 2 OF 2 PAGES		
TITLE/SUBJECT/ACTIVITY/FUNCTIONAL AREA MONTHLY REVIEW OF USER'S BLANKET PURCHASE AGREEMENTS (BPAs)		OPR	DATE	
		4409 th LS/LGC	1 Dec 97	
NO.	ITEM	YES	NO	N/A
5.	Invoices (a) Were invoices promptly processed? (b) Was each item on the invoice crossed checked with the Price List to ensure the correct billed price? (c) Did each invoice have a call number listed on it? (The OO should write it on the invoice if the contractor doesn't.) (d) Were receiving reports properly filled out for each invoice? (e) Were copies of the receiving report sent to the CCO?			
6.	Monthly Documents (a) Was the Monthly Report, Monthly Call Register, and copies of Receiving Reports submitted to the CCO (on time)?			
7.	Training (a) Are all ordering officers trained and appointed by CCO? (b) Are unit Commanders/equivalent and NCO Unit Program Monitors trained by CCO?			
8.	Ethics, gifts, personal services, etc. (a) Has any contractor offered meals, gifts, personal services, etc to ordering officers?			
9	CCO tailored items (specific to each BPA)			
REMARKS				

ATTACHMENT 17a