



Purchasing Officer I/II

Class Code:
418, 419

DEFINITION

Under direction from the Manager of Finance, provides leadership, plans, directs and supervises professional and support staff engaged in the centralized purchasing of supplies, materials, equipment and services and the provision of miscellaneous general office support services; performs and/or guides the most difficult and complex professional purchasing activities; initiates complex analyses and studies; advises the department manager on matters pertinent to the centralized purchasing function that have District-wide impact; develops and recommends implementation of systemic improvements; and performs related work as required.

DISTINGUISHING CHARACTERISTICS

Purchasing Officer I is the first level in the Purchasing Officer series. Under close to general direction within a framework of established policies and procedures, the incumbent performs supervisory work related to the centralized purchasing function and general office support services. The incumbent performs the full range of more routine, day-to-day work tasks under closer supervision, while learning and demonstrating ability to perform more complex activities. Assignments are given in general terms and are subject to frequent review while in progress and upon completion. There is some latitude for independent judgment and action in well-defined areas of work.

This class is distinguished from the fully-experienced Purchasing Officer II by performance of more routine work activities that are limited in scope with a lesser degree of independent judgment and action exercised. The Purchasing Officer I and II classifications are flexibly staffed. An incumbent in this classification normally advances to a Purchasing Officer II after two (2) years at the first level and upon recommendation of the department manager, approval of the General Manager and demonstrated proficiency to meet the job requirements of the Purchasing Officer II classification, including independently planning, leading and supervising a comprehensive purchasing program for the District.

Purchasing Officer II is the experienced, journey-level in the Purchasing Officer series. Under general direction within a framework of established policies and procedures, the incumbent independently performs the full range of routine to highly complex supervisory work requiring advanced knowledge of purchasing principles and requirements and substantial professional experience to enable analysis of complex operations, development of recommendations for implementation of systemic improvements and provision of high-level advice to the department manager relative to the purchasing function. Assignments are given in general terms and are subject to periodic review usually upon completion. There is significant latitude for discretion and independent judgment in the selection of work methods to achieve established goals.

This classification is distinguished from the Manager of Finance in that the latter is a department head with overall responsibility for directing District-wide finance and related support services and provides direction to this classification.

TYPICAL DUTIES

TYPICAL EXAMPLES OF DUTIES MAY INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING:

- Provides leadership, plans and implements a comprehensive purchasing program; conducts major studies and analyses of complex operations; recommends and implements systemic improvements; and advises the department manager on matters pertaining to the District's purchasing program and the impact on District operations.
- Ensures the agency's business needs are met by hiring skilled and experienced staff; participates in selection interviews and hiring of new staff; prioritizes, assigns and reviews work; provides staff with cross-training and professional development opportunities; reviews and approves bi-weekly time entry and time-off requests; establishes employee goals and objectives and prepares employee performance evaluations; interprets District policies and procedures to employees and administers day-to-day aspects of labor agreements with employee organizations.
- Develops and updates written purchasing policies and procedures; explains and interprets policies and procedures to staff needing to purchase materials, equipment, services and supplies; and enforces compliance with Board adopted purchasing policies. Works with legal counsel on contractual and procurement policy issues.
- Assists departments in obtaining specifications, quotations, delivery terms and costs and recommends substitute materials where economies can be realized or delivery improved.
- Prepares the annual budget for the work unit and select District-wide expenditures, such as office supplies and postage; estimates staffing and capital equipment needs based upon planned activities; monitors expenditures after budget adoption; and approves requisitions for Purchasing in compliance with established procurement guidelines.
- Issues Requests for Proposals, Invitations for Bids, Requests for Quotations and Requests for Information as needed. Creates amendments to agreements and negotiates with vendors to achieve the best possible outcome for the District.
- Creates, reviews and approves purchase orders as necessary using enterprise procurement software. Ensures that solicitations comply with District procedures, specifications, governmental regulations and accepted trade practices; resolves billing discrepancies and vendor disputes.
- Oversees the procurement credit card program; reviews purchases for compliance with program limitations; maintains written policies and procedures; implements and maintains business optimization processes and procedures to streamline card use; communicates with cardholders to provide program guidance and assists with reconciliation process as needed; maintains professional working relationship with bank account manager; and conducts account maintenance through the bank's website.
- Oversees the District's surplus personal property program that may include public auctions, reuse, sale of scrap metal, donations, and e-waste.

Purchasing Officer I/II

- Directs the District's General Services activities including mail services, janitorial and break room supplies, and duplicating/printing services.
- Represents Procurement on District-wide committees; proactively collaborates with departments to implement program changes, resolve issues and promote workload efficiencies as necessary; and represents the District externally.
- Performs other related work as required.

REQUIREMENTS

Any combination of education and experience that would likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be the equivalent of:

Education and Experience:

Possession of a Baccalaureate degree from an accredited college or university with a major in business administration, public administration or a related field; and

Purchasing Officer I: Four (4) years of full-time progressively responsible purchasing experience with at least two (2) years in a lead capacity directing the work of others.

Successful completion of the District's Pre-Supervisory Training Program may be substituted for the two (2) years in a lead capacity directing the work of others.

Purchasing Officer II: Two (2) years of full time experience as a Purchasing Officer I with the District or its equivalent that included responsibility for the supervision of professional buyers or buyers; assistants.

Knowledge, Skills and Abilities:

Knowledge of: principles, methods and legal requirements of purchasing as they relate to competitive bidding, vendor selection, contract award, placement of purchase orders for supplies, materials, services and equipment and contract administration; modern principles and practices of effective employee supervision and personnel management; materials, equipment and supplies commonly used in a water utility or public agency; the Uniform Commercial Code, contract law and other applicable laws and regulations; inventory procedures, product standards, lot sizes, and marketing trends; equipment and asset surplus disposal practices and procedures; sources of supply, marketing practices, and pricing methods; basic financial record keeping, contract management and inventory control principles and procedures; mail processing techniques, records management; current office practices and procedures; business English and basic mathematics; safe work practices and the ability to identify workplace hazards and/or unsafe conditions and take appropriate corrective action.

Skill and Ability to: provide leadership, plan and implement a comprehensive purchasing program; plan, assign, supervise and review the work of subordinate staff; resolve day-to-day employee relations matters; interpret and apply District policies and procedures; analyze data and come to well reasoned conclusions; evaluate bids and quotes; reconcile discrepancies; expedite transactions and follow-up on purchasing matters; make accurate mathematical calculations; inspect items received and determine conformance to specifications; organize work and utilize effective time management techniques to meet critical deadlines; react with a sense of urgency and work independently within procedural guidelines to solve purchasing

problems; read and interpret policies, procedures, engineering/technical drawings and specifications; effectively use a computer, software applications and standard office equipment; maintain detailed and accurate records; initiate and conduct complex analyses and studies; communicate effectively and tactfully, both orally and in writing; establish and maintain effective working relationships with internal staff, vendors and others contacted in the course of the work; and perform essential duties of the job without causing harm to self or others.

Additional Requirements:

- Must possess a valid California driver's license and have a satisfactory driving record.
- Possession of one or more certifications such as a Certified Professional Public Buyer, Certified Public Procurement Officer, or Certified Professional in Supply Management is desirable.

Working Conditions/Physical Requirements:

The essential functions of this classification are performed in a controlled-temperature office and require the ability to: sit for extended periods of time in front of a computer screen; use finger dexterity and hand strength to perform simple grasping and fine manipulation; use a telephone and operate a computer and other office equipment on a daily basis; speak and hear in person and on the phone; see sufficiently to perform assignments; and intermittently twist or bend to reach equipment or supplies surrounding desk; walk about District administrative complex to obtain information; and occasionally lift items weighing between 20 and 55 pounds.

Revised: 07/15

Approved: 
Human Resources/Risk Manager