This class specification indicates, in general terms, the type and level of work performed as well as the responsibilities of employees in this classification. The job functions described are not to be interpreted as being all-inclusive to any specific employee.

DEFINITION

Under general supervision or direction, performs complex and responsible professional journey-level purchasing and procurement work with consideration of cost, quality, reliability of source, and urgency of need following established policies, procedures, and practices; negotiates for specific commodities and services, analyzes quotes received, processes purchase orders in order to award supplier, and expedites deliveries; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision or direction from the assigned supervisory and/or managerial staff. Exercises no direct supervision of staff. May coach and/or mentor less experienced staff.

CLASS CHARACTERISTICS

This classification is the third of four (4) levels within the purchasing job series. Employees at this level perform more difficult assignments, projects, analyses, and programs assigned to classes within this series, receive occasional instruction or assistance as new or unusual situations arise, and have full and thorough knowledge of the concepts, practices, procedures, and policies of purchasing and procurement. Responsibilities may include guidance on programs and/or projects. Successful performance of the work requires thorough knowledge of governmental procurement practices and procedures, purchasing, and formal and informal bid processes. This class is distinguished from the Purchasing Supervisor in that the latter is responsible for planning, organizing, and coordinating all programs, projects, and activities of the purchasing function.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

The following essential job functions are typical for this classification. Incumbents may not perform all of the listed job functions and/or may be required to perform additional or different job functions from those set forth below to address business needs and changing business practices.

- Provides complex professional and technical assistance in the administration and implementation of the District's purchasing and procurement programs, including purchasing a variety of materials, services, supplies, and equipment.
- Ensures established safety precautions are adhered to, corrects unsafe work conditions/practices, and/or reports unsafe work conditions/practices to assigned supervisory or managerial staff.
- Performs a wide variety of complex duties involved in the procurement of materials, supplies, services, and equipment for District departments and operations; ensures all purchasing activities comply with policies, procedures, rules, and regulations.
- Participates in the preparation and administration of the Request for Proposal (RFP) and Notification of Bid (NIB) processes; reviews, suggests changes to, and finalizes Scope of Work with end users; verifies vendor lists; reviews and finalizes RFP and NIB packages; publishes RFP and/or NIB and supporting documents to the online bidding database; receives and reviews proposals; prepares
evaluation tools; prepares for and conducts Job Walk or Pre-Bid meetings; issues Addenda and Question and Answers; checks references; sends outcome letters; assists in contract preparation and distribution; requests proof of insurance; creates purchase orders.

- Processes contract/purchase change orders; receives requisitions from end users and verifies supporting documents and budget information; reviews files for compliance with District policies and purchasing thresholds; coordinates the creation of change orders to agreement; reviews signed and returned contracts; changes purchase orders as appropriate.

- Orders stock and non-stock items; requests and reviews quotes; creates purchase orders; places orders; maintains records.

- Administers blanket purchase orders for convenience, maintenance, and service items; tracks expiration dates; sends notices of expiration to end-users; requests quotations for new fiscal year from vendors; requests insurance; creates purchase orders.

- Maintains documentation and interfaces with receiving, accounting, and vendors to analyze and resolve invoice, delivery, past-due orders, damaged, or incorrect goods or discrepancies; coordinates documentation required for vendor repairs and exchanges; works with warehouse and end-users for equipment that must be sent out for repairs; finds appropriate vendors and schedules pick-up of repair items, follows up on status of repair.

- Identifies, investigates, and recommends new or alternate sources of supplies with consideration for availability, price, and product performance; arranges for the demonstration or field-testing of new products or services.

- Maintains procurement card purchases; places orders via credit card, follows up to ensure delivery, obtains receiving paperwork, reconciles credit card statements monthly.

- Participates in the Buyer Outreach Program; meets with assigned departments on a scheduled basis; reviews capital equipment schedule; provides general as well as policy information; maintains ongoing communication with departments.

- Maintains effective working relationships with vendors/contractors; resolves discrepancies and disputes; develops and administers vendor/contractor agreements; negotiates terms and conditions of contracts; maintains related files and databases.

- Receives and responds to inquiries from employees and vendors regarding procurement policies and procedures; investigates complaints and recommends corrective action as necessary for resolution.

- Evaluates product usage trends; forecasts District needs and projects costs; evaluates available products and services from various sources; and develops procurement solutions.

- Participates in surplus property disposal; reviews items to be discarded; requests approvals; verifies bid lists; receives and reviews bids; requests proof of insurance; sends award letters; arranges for payments; coordinates logistics.

- Establishes and maintains files and records of purchasing activities.

- Makes recommendations for modifications in procurement policies and ordinances.

- Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of purchasing and procurement; researches emerging products and enhancements and their applicability to District needs.

- Provides leadership and guidance to others on assigned programs and/or projects. As a program and/or project leader, may direct, assign, train, monitor and review the work activities of team members; determines work priorities; oversees quality and quantity of work performed and ensures adherence to established procedures by instructing employees accordingly; is a resource to employees by possessing specialized skills; develops and implements work improvements.

- Acts for the Purchasing Supervisor in his/her absence.

- Performs related duties as assigned.
QUALIFICATIONS

Knowledge of:
- Modern principles, practices, and methods of public and governmental purchasing and procurement programs and processes and their application to District operations.
- General principles and practices of data processing and its applicability to purchasing programs and functions.
- Materials, supplies, and equipment commonly used in the construction, operation, and maintenance of a wastewater facility.
- Principles and applications of critical thinking and analysis.
- Principles and methods of negotiations.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Principles and practices of business organization and public administration.
- Practices and techniques of automated and manual financial document processing and record-keeping.
- Modern office practices, methods, and computer equipment and computer applications related to work, including word processing and spreadsheet software.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Principles and practices of customer service and techniques for effectively communicating with the public, vendors, contractors, and District staff.

Ability to:
- Perform work of a specialized nature and develop the ability to use independent judgment and personal initiative.
- Evaluate the quality and price of products to judge suitability of goods and/or alternatives offered.
- Advise and explain purchasing policies, procedures, and standards.
- Apply critical thinking and analysis to a broad range of situations and to make decision and problem-solve.
- Research and utilize data and information to achieve cost effective results.
- Interpret, apply, explain, and ensure compliance with Federal, State, and local policies, procedures, laws, rules, and regulations.
- Identify problems, research and analyze relevant information, develop and present recommendations and justification for solution.
- Negotiate contracts, agreements, and/or pricing schedules for services, supplies, and equipment.
- Maintain accurate financial records and reports for informational, auditing, and operational use.
- Maintain confidentiality in maintaining critical and sensitive information, records, and reports.
- Review and verify accuracy of data.
- Make accurate arithmetic, financial, and statistical computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Understand and carry out a variety of complex instructions in a responsible and independent manner.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Train others on proper work procedures.
- Adhere to safe work practices and procedures in the workplace.
- Lead subordinate-level staff on programs and projects.
- Resolve conflict through supervision in establishing workable solutions and alternative approaches.
- Utilize a computer, relevant software applications and/or other equipment.
- Operate a motor vehicle and travel to various District sites, projects and/or meetings.
- Effectively communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines.
➢ Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Employment Standards:
Any combination of education and experience that provides the required knowledge, skills, and abilities may be qualifying as determined by OCSD.

1. Bachelor’s degree from a college or university accredited by the U.S. Department of Education, with major coursework in business or public administration, purchasing, accounting, finance, or a related field; AND,
2. Three (3) years of work experience in purchasing or contracts.

Licenses and/or Certifications:
➢ Valid California Class C Driver’s License.

Disaster Service Workers:
All Orange County Sanitation District employees are designated Disaster Service Workers through state law (California Government Code Section 3100-3109). Employment with the Orange County Sanitation District requires the affirmation of a loyalty oath to this effect. Employees are required to complete all related training as assigned, and to return to work as ordered in the event of an emergency.

PHYSICAL DEMANDS
Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; ability to travel to various District sites, projects and/or meetings; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 10 pounds.

ENVIRONMENTAL ELEMENTS
Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.