CONTRACTS/PURCHASING ASSISTANT

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 direct or general supervision or direction, performs a variety of administrative support duties for District contracts/purchasing operations including preparing solicitation/bid packages, attending and supporting pre-proposal/pre-bid conferences, publishing legal ads, and monitoring the bid process to ensure efficient closure; maintains records in compliance with program requirements and District guidelines; and performs a variety of administrative tasks relative to assigned area of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives direct or general supervision or direction from the assigned supervisory and/or managerial staff. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

This classification is the first of four (4) levels within both the contracts job series and the purchasing job series. Incumbents perform the full range of contracts and procurement administrative support duties, including assisting with requests for proposals and soliciting bids. Positions at this level receive occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Contracts Administrator/Buyer in that the latter performs routine work in managing the business relationship of contract parties in coordination with District staff, legal counsel, and outside contractors and participates in the development and fulfillment of contract requirements.

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.

➢ Assists in preparing solicitation instruments including Requests for Proposals (RFPs) and Invitations for Bids (IFBs); prepares drafts as requested; verifies list of potential bidders; compiles, collates, and copies RFP’s/IFB’s; addresses and stuffs envelopes and distributes to proposers/bidders; assists in preparing addenda and other solicitation related documents and distributing to proposers/bidders; uploads solicitation documents to District’s on-line bidding vendor(s); prepares legal ads and/or public notices for RFPs/IFBs at least ten days prior to proposal/bid due date; and updates/maintains database.
➢ 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.
➢ Participates in bid openings and tabulation; reserves and sets up meeting rooms for pre-bid conferences; prepares bid-conference agendas; creates and sends notifications of pre-bid conferences; finalizes contract agreements and maintains IFB and RFP files; generates and finalizes award recommendation notices and documents for Board approval; facilitates and tracks contract document
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signature process; updates contract files as change orders, amendments, addendums, extensions, reallocations, and special agreements are developed; generates purchase orders.

➢ Assists with project close-out including preparing closeout notices, notice of completion, release of retention, purchase order closeout and final document collection/records administration.

➢ Receives, sorts, and matches daily requisitions with purchase orders; stamps invoices as appropriate; separates purchase order packages and forwards matched orders to supervisor for review; faxes/scans purchase orders and attaches confirmation of faxes/scans to package. Generates purchase orders and processes change orders on behalf of principal/senior/contract administrators/buyers.

➢ Creates and maintains file folders for purchase orders; documents purchase order number, expedites, date of expiration, description, and name of company the order was issued to; files completed purchase order packages.

➢ Orders office supplies for all assigned divisions; processes and faxes/scans stationary supply orders to vendors; retains copies of orders with fax/scan confirmation sheet.

➢ Works on and supports a variety of projects; participates in the collection, compilation, and analysis of information from various sources on a variety of specialized topics related to assigned projects and programs; participates in the preparation of reports that present and interpret data, identifies alternatives, and makes and justifies recommendations.

➢ Reviews and verifies materials, applications, records, and reports for completeness and conformance with established regulations and procedures; applies applicable policies and procedures for determining completeness of applications, records, and reports; collects and processes appropriate information; conducts periodic internal audits to ensure that proper documentation and procedures have been maintained.

➢ Serves as liaison with other District staff, the general public and outside agencies; provides information and assistance as appropriate; explains programs, policies, and activities; interprets and applies policies and procedures as necessary.

➢ Recommends improvements in work flow, policies and procedures; implements improvements as approved; develops and reviews forms and report formats as required. Participates in the development/maintenance of desktop procedures for specific job assignments.

➢ Maintains contracts/purchasing records in compliance with program rules and regulations and District guidelines; coordinates preparation of records for transfer to off-site storage; coordinates records disposition or destruction activities.

➢ Continually updates the contracts/purchasing/materials management intranet web site and other related sites; adds or updates forms, new information, user codes and bid information.

➢ Performs a variety of general administrative duties; prepares and distributes correspondence for department staff; receives and forwards phone calls; provides information to callers; prepares and prints various reports.

➢ Maintains District’s procurement card program.

➢ Responds to customer service requests from the public, employees and contractors; prepares and sorts mail.

➢ Attends various meetings and training seminars as required.

➢ Performs various related duties as assigned.

QUALIFICATIONS

Knowledge of:

➢ Basic principles of bid and contract processes.

➢ Basic principles and practices of a formal bidding process.

➢ Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.

➢ Business letter writing and the standard format for reports and correspondence.

➢ Principles and practices of data collection and report preparation.
Modern office practices, methods, and computer equipment and software applications related to the work, including word processing, web design, database, and spreadsheet applications.

Business mathematics and basic statistical techniques.

Record keeping principles and procedures.

English usage, grammar, spelling, vocabulary, and punctuation.

Principles and practices used in establishing and maintaining files and information retrieval systems.

Principles and practices of customer service and techniques for effectively communicating with the public, vendors, contractors, and District staff.

Ability to:

- Perform responsible administrative support work with accuracy, speed.
- Provide varied and responsible secretarial and office administrative work requiring the use of tact and discretion.
- Understand the organization and operation of the District and of outside agencies as necessary to assume assigned responsibilities.
- Interpret, apply, and explain administrative and departmental policies and procedures.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Compose correspondence and reports independently or from brief instructions.
- Make accurate mathematical, financial, and statistical computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- 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.
- Utilize a computer, relevant software applications and/or other equipment.
- Work independently in the absence of supervision.
- Adhere to safe work practices and procedures in the workplace.
- Effectively communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- 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. High school diploma or G.E.D., supplemented by specialized training or coursework in accounting, purchasing, contracts, or a related field; AND
2. Three (3) years of work experience in administrative support.

Licenses and/or Certifications:

- None.

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; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, typewriter 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 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.