

CONTRACT/PURCHASING TECHNICIAN

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, performs a variety of technical duties in support of OC San's 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 OC San guidelines; performs a variety of administrative tasks relative to assigned area of responsibility; and performs duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

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

CLASS CHARACTERISTICS

This classification is the first of four levels within both the contracts and purchasing job series. This class is responsible for performing a variety of routine and technical duties in support of OC San's contracting and purchasing programs, working independently, and exercising judgment and initiative. Positions at this level receive only 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 Buyer in that the latter is a professional-level class responsible for performing routine purchasing and procurement work.

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 RFPs/IFBs; 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 OC San's online bidding vendor(s) site; prepares legal ads and/or public notices for RFPs/IFBs at least ten days prior to proposal/bid due date; updates/maintains database.
- Participates in bid openings and tabulation; reserves and sets up meeting rooms for pre-bid conferences; prepares pre-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 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 contract administrator and buyer classifications.
 - Creates and maintains file folders for purchase orders; documents purchase order number, date of expiration, description, and name of company the order was issued to; files completed purchase order packages; runs monthly reports for expiring purchase orders; updates notice of expiration responses received from end users and maintains documentation; expedites orders as requested; acts as liaison between vendors, buyers, end users, and warehouse staff; updates delivery dates.
 - Creates and updates insurance profiles for vendors in OC San's database; determines risk profile from Determined Insurance Risk Form and uploads documents for compliance; follows up with vendors in the event of deficiencies; assists vendors with questions; maintains all related documentation.
 - Maintains OC San's procurement card program; explains program policies and provides assistance to all cardholders and approvers; creates, edits, and deletes accounts for cardholders as requested and per policy; reconciles cardholder purchases monthly; reports any misuse; runs monthly usage reports.
 - Orders office supplies for all assigned divisions; processes and faxes/scans stationary supply orders to vendors; and 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 OC San 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 workflow, policies, and procedures and implements improvements upon approval; develops and reviews forms and report formats as required; participates in the development and maintenance of desk procedures for specific job assignments.
 - Maintains contracts/purchasing records in compliance with program rules and regulations and OC San 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.
 - Attends various meetings and training seminars as required.
 - Ensures safety and health procedures and precautions are adhered to, corrects unsafe work conditions/practices, and/or reports unsafe work conditions/practices to assigned supervisory or managerial staff.
 - Performs duties as assigned.

QUALIFICATIONS

Knowledge of:

- Basic principles of bid and contract processes.
- Basic principles and practices of a formal bidding process.
- Business letter writing and the standard format for reports and correspondence.
- Principles and practices of data collection and report preparation.
- Business mathematics and basic statistical techniques.
- Record keeping principles and procedures.
- Applicable federal, state, and local laws, codes, and ordinances relevant to area(s) of responsibility.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Current equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Perform detailed clerical and technical contract and purchasing duties supporting the administration and implementation of OC San's contracts and purchasing programs.
- Understand the organization and operation of OC San and of outside agencies as necessary to assume assigned responsibilities.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Compose correspondence and reports independently or from brief instructions.
- Collect, compile, and research information and data.
- Make accurate mathematical, financial, and statistical computations.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.
- Comply with safe work practices and procedures in the workplace.
- Provide a high level of customer service by effectively dealing with the public, vendors, contractors, and OC San staff.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- 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 OC San.

1. High school diploma or G.E.D., supplemented by specialized training or coursework in accounting, purchasing, contracts, or a related field.
2. Two (2) years of clerical and technical work experience supporting purchasing and/or contract administration programs.

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

- Mobility to work in a standard office setting and use standard office equipment, including a computer; this is primarily a sedentary office classification although standing in work areas and walking between work areas may be required; occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information; ability to lift, carry, push, and pull materials and objects up to 35 pounds.
- Vision to read printed materials and a computer screen.
- Hearing and speech to communicate in person and over the telephone.
- Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment.

ENVIRONMENTAL ELEMENTS

- 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.

OTHER REQUIREMENTS

- Probationary Period: All OC San employees, except classifications considered “at-will”, are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, policies, and/or resolutions. Employees who have not yet successfully completed their initial probationary period serve “at-will” and may be released from employment without cause or recourse to any appeal or grievance procedures.
- Pre-Employment: All employment offers are contingent upon successful completion of OC San’s pre-employment process, which includes a background investigation, a physical examination, and a drug screen.
- Work Location Assignment: Employees will be assigned to a work location based on business needs which may be located at any/all of OC San locations; this work location may be changed at any time.