

## PROCUREMENT OFFICER SERIES

<b>Code No.</b>	<b>Class Title</b>	<b>Occ. Area</b>	<b>Work Area</b>	<b>Prob. Period</b>	<b>Effective Date</b>	<b>Last Action</b>
0307	Procurement Officer Assistant	03	356	6 mo.	09/15/16	Rev.
0308	Procurement Officer	03	356	12 mo.	09/15/16	Rev.
0309	Procurement Officer Specialist	03	356	12 mo.	09/15/16	Rev.
1128	Procurement Officer Supervisor	03	356	12 mo.	09/15/16	Rev.

### *Promotional Line: 4*

#### Series Narrative

Employees in this series are engaged in the purchase of materials, equipment, machinery, construction, supplies, and/or services. Generally, these employees are assigned to a centralized institutional purchasing office. Assigned procurement activities are conducted in accordance with federal and state regulations and designated institutional policies/protocols.

#### DESCRIPTIONS OF LEVELS OF WORK

#### **Level I: Procurement Officer Assistant** **0307**

Employees at this level are entry level procurement personnel who assist in purchasing functions for a variety of products and services. They work under direct supervision from a designated supervisor.

A Procurement Officer Assistant typically

1. Assists the primary Procurement Officer with:
  - a. verification of pricing and delivery/lead times, and receiving information.
  - b. requesting, preparing, and/or reviewing required forms related to requisitions and potential orders; working with departments in preparing specifications for purchasing commodities, equipment, and services, or for requisition clarification.
  - c. preparation and solicitation of quotations and bids; election and/or recommendation of qualified vendors/suppliers; notification of vendors regarding any required disclosure and/or certification forms relating to orders, such as certificates of insurance, vendor financial disclosure, and contract certification forms; and evaluation of documents and forms for accuracy and completeness.
  - d. preparation of reports and correspondence (such as the status of requisitions, purchase orders, shipments, and complaints); providing of interpretation of policies and procedures, rules and regulations, revised statutes and internal guidelines to campus personnel and vendors.
2. assists in the coordination, review, issuance and/or acceptance of simple contract documents (e.g. maintenance agreements).

3. issues purchase orders with appropriate authorization authority.
4. monitors and follows applicable laws, regulations, policies, guidelines.
5. performs other related duties as assigned.

**Level II: Procurement Officer****0308**

Employees at this level are buyers who perform purchasing functions for a variety of products and services, and who advise user departments on the purchase of such items. They work under general supervision from a designated supervisor.

A Procurement Officer typically

1. contacts vendors to verify pricing, delivery/lead terms, and to request required forms related to requisitions and potential orders.
2. reviews requisitions for accuracy/completeness and contacts departments for requisition clarification.
3. selects and/or recommends suppliers or contacts requisitioning departments to determine acceptable suppliers.
4. works to ensure that receiving information is efficiently processed to expedite payment processing.
5. assists user departments in preparing specifications for purchasing commodities, equipment, and services.
6. notifies vendors/contractors that they need to provide various disclosure and/or certification forms relating to orders, such as certificates of insurance, vendor financial disclosure, and contract certification forms and evaluates for completeness.
7. prepares and solicits quotations, bids and requests for proposals, evaluates documents and forms for accuracy and completeness, recommends qualified vendors/contractors, and issues purchase orders with appropriate authorization authority.
8. assists in the analysis of requests for extensions or amendments to existing contracts and make recommendations of approval or alternative solutions to management; may participate in planning and negotiating sessions with suppliers and departments.
9. interviews salespeople to determine sources of supply, current market trends, possible discount schedules/contracts, and to clarify any problems with particular vendors/contractors.
10. investigates complaints from departments and vendors/contractors and problems arising from the procurement of commodities; determines an appropriate action to resolve vendor/contractor grievances and claims against suppliers.
11. serves as a general procurement resource person (answers questions regarding the characteristics, capabilities, and applicability of assigned commodities and services).

12. prepares reports and correspondence (such as the status of requisitions, purchase orders, shipments, and complaints) related to his/her assigned products.
13. assists in on-the-job training and oversee/supervise other staff.
14. assists in the coordination, review, issuance and/or acceptance of simple contract documents (e.g. maintenance agreements).
15. provides interpretation of policies and procedures, rules and regulations, revised statutes and internal guidelines to campus personnel and vendors/contractors.
16. reviews and coordinates purchasing contracts and files (ensures they are transmitted to vendors/contractors in a timely manner, maintains records including a database, if applicable).
17. monitors and follows applicable laws, regulations, policies, guidelines.
18. performs other related duties as assigned.

**Level III: Procurement Officer Specialist****0309**

Employees at this level are experienced buyers who may perform complicated and highly specialized purchasing functions, serve as the lead worker, and/or assist the head of a purchasing program in the operation and management of the program. They work under direction from a designated supervisor in a purchasing office.

A Procurement Officer Specialist typically

1. performs purchasing activities for complex products and services; assists user departments in preparing specifications, prepares and solicits quotations, bids and requests for proposals, makes awards, and inspects and/or monitors the testing of delivered commodities.
2. uses enterprise resource planning software to organize/maintain records and/or locate inventory.
3. develops purchasing analysis and reporting tools, converts vendor/contractor units and quantities to campus units and quantities automatically.
4. responsible for non-regular product purchasing or unique merchandise.
5. obtains required administrative and proprietary approvals for purchasing.
6. supervises and/or oversees the purchasing activities of procurement staff.
7. prepares contracts such as leases, purchases, and installment purchases for review; administers subsequent changes or revisions to those contracts.
8. represents procurement in negotiating changes to proposed agreements when they do not conform to legal and/or university requirements.

9. analyzes requests for extensions or amendments to existing contracts and makes recommendations of approval or alternative solutions to management; participates in planning and negotiating sessions with suppliers and departments.
10. assists in processing contracts from which the University receives income or provides a concession to suppliers.
11. investigates complaints from departments and vendors/contractors and problems arising from the procurement of commodities; determines an appropriate action to resolve vendor/contractor grievances and claims against suppliers.
12. serves as an assigned buyer for the procurement of surplus property or other items procured from state and/or federal agencies.
13. understands market conditions, counsels administrators and employees on general and specific purchasing policies and rules; studies internal purchasing procedures and recommends changes, if necessary.
14. gathers data and develops reports, as necessary.
15. assists with reviews, analysis, and participates in the development and implementation of operational policies and procedures.
16. performs duties of the lower-level in this series as required.
17. performs other related duties as assigned.

**Level IV: Procurement Officer Supervisor****1128**

Employees at this level have an understanding of specialized markets in order to manage a procurement program, provide administrative assistance in the total operation and administration of a procurement program, and/or manage a functional section of Procurement staff within a procurement office.

A Procurement Officer Supervisor typically

1. approves requisitions for the purchase of goods and services; reviews requisitions for accuracy, specifications and completeness; contacts departments concerning clarifications; verifies that all required approvals have been obtained.
2. supervises, plans, assigns, and reviews procurement work activities of staff; counsels staff on conduct in procurement; evaluates job performance, and approves or recommends personnel actions.
3. prepares documents or letters of transmittal for the University Administration or the Board of Trustees' to approve requisitions as delegated.
4. meets with vendor/contractor representatives to determine sources of supply, discuss pricing discounts/contracts and to resolve any problems with a particular vendor/contractor.

5. responsible for solutions to highly complex functions (such as budgetary planning, relationships with state and federal agencies, procurement planning and bid auditing, pricing, invoicing, reconciliation, etc.) for maximum cost-efficiency in procurement.
6. coordinates and oversees auditing activities; serves as primary liaison to departments, administrators, and other contacts concerning procurements; monitors and implements policies and procedures for compliance and oversees the preparation of the required documentation.
7. performs research or investigatory functions in the procurement area (such as assisting users in the development of specifications for a total campus system) and/or in the preparation and administration of contracts.
8. performs or supervises procurement of highly technical and/or critical items.
9. approves purchase orders and requisitions involving a major commitment of the institution's resources.
10. develops and administers (perhaps in conjunction with the head of the department) the procurement department's budget.
11. administers and trains others in Enterprise Resource Planning (ERP) or related procurement systems.
12. analyzes and prepares statistical reports, narrative reports, and publications for use in formulating the goals and objectives of the program.
13. serves on various committees representing the procurement department.
14. stays abreast of market conditions and delivery lead time to rebid and/or renew a contract.
15. forecasts demand or creates supply plans that ensure availability of materials or products.
16. monitors forecasts and quotas to identify changes or to determine their effect on supply chain activities.
17. defines performance metrics for measurement, comparison, or evaluation of supply chain factors, such as product cost or quality.
18. analyzes inventories to determine how to increase inventory turns, reduce waste, or optimize customer service.
19. performs duties of the lower-levels in this series as required.
20. performs other related duties as assigned.

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:**Level I: Procurement Officer Assistant****0307**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or combination of the following, totaling six (6) months from the categories below:
  - a. Responsible work experience in fields that provide preparation for procurement work such as *claim resolution, expediting, returned goods, and/or resolving billings.*
  - b. 30 semester hours of college credit for course work in any field

## KNOWLEDGE, SKILLS &amp; ABILITIES (KSAs)

1. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
2. Basic knowledge of arithmetic and its application.
3. Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, spreadsheets, designing forms, and other office procedures and terminology.
4. Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
5. Analytical skill; job requires analyzing information and using logic to address work-related issues and problems.
6. Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
7. Ability to work with others and skill in effective communication.
8. Attention to detail; being careful about detail and thorough in completing tasks.
9. Ability to take initiative; a willingness to take on responsibilities and challenges.
10. Ability to organize work patterns and establish priorities.

**Level II: Procurement Officer****0308**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following, totaling one (1) year (12 months) from the categories below of which six (6) months must be actual work experience:

- a. Work experience performing duties comparable to those performed at the Procurement Officer Assistant level of this series or in positions of comparable responsibility<sup>[i]</sup>.

AND

- b. College credit for course work in any field
  - 30 semester hours equals six (6) months
  - 60 semester hours or Associate's Degree equals one (1) year (12 months)
  - 90 semester hours equals two (2) years (24 months)
  - 120 semester hours or a Bachelor's Degree equals three (3) years (36 months)
  - Master Degree or higher equals four (4) years (48 months)

#### KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
2. Basic knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
3. Knowledge of laws, the Illinois Procurement Code, government regulations, executive orders, knowledge of State of Illinois and State University Procurement procedures, as well as state and federal laws as they pertain to purchasing.
4. Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
5. Knowledge of principles and methods for moving people or goods by air, rail, sea, or road, including the relative costs and benefits.
6. Knowledge of materials related to procurement, production processes, quality control, costs, and other techniques for maximizing the effective manufacture and distribution of goods.
7. Skill in negotiation and facilitation.
8. Skill in completing assignments accurately and with attention to detail.
9. Ability to analyze and solve work related problems.
10. Ability to communicate effectively in both oral and written form.
11. Ability to work successfully as a member of a team and independently with moderate supervision.
12. Ability to train and supervise others.

**Level III: Procurement Officer Specialist****0309**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following, totaling two (2) years (24 months) from the categories below of which one (1) year (12 months) must be actual work experience:
  - a. Work experience performing duties comparable to those performed at the Procurement Officer level of this series or in positions of comparable responsibility<sup>[1]</sup>.

AND

- b. College credit for course work in any field
  - 30 semester hours equals six (6) months
  - 60 semester hours or Associate's Degree equals one (1) year (12 months)
  - 90 semester hours equals two (2) years (24 months)
  - 120 semester hours or a Bachelor's Degree equals three (3) years (36 months)
  - Master Degree or higher equals four (4) years (48 months)

## KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
2. Basic knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
3. Knowledge of laws, the Illinois Procurement Code, government regulations, executive orders, knowledge of State of Illinois and State University Procurement procedures, as well as state and federal laws as they pertain to purchasing.
4. Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
5. Knowledge of principles and methods for moving people or goods by air, rail, sea, or road, including the relative costs and benefits.
6. Knowledge of materials related to procurement, production processes, quality control, costs, and other techniques for maximizing the effective manufacture and distribution of goods.
7. Skill in negotiation and facilitation.
8. Skill in completing assignments accurately and with attention to detail.
9. Ability to analyze and solve work related problems.
10. Ability to communicate effectively in both oral and written form.



11. Ability to work successfully as a member of a team and independently with moderate supervision.
12. Ability to train and supervise others.

**Level IV: Procurement Officer Supervisor****1128****CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

1. Any one or any combination of the following, totaling four (4) years (48 months) from the categories below of which one (2) years (24 months) must be actual work experience<sup>i</sup>:
  - a. Work experience performing duties comparable to those performed at the Procurement Officer Specialist level of this series or in positions of comparable responsibility.<sup>ii</sup>

AND

- b. Six (6) months college credit for course work in any field
  - 30 semester hours equals six (6) months
  - 60 semester hours or Associate's Degree equals one (1) year (12 months)
  - 90 semester hours equals two (2) years (24 months)
  - 120 semester hours or a Bachelor's Degree equals three (3) years (36 months)
  - Master Degree or higher equals four (4) years (48 months)

**KNOWLEDGE, SKILLS AND ABILITIES (KSAs)**

1. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
2. Basic knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
3. Knowledge of laws, the Illinois Procurement Code, government regulations, executive orders, knowledge of State of Illinois and State University Procurement procedures, as well as state and federal laws as they pertain to purchasing.
4. Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
5. Knowledge of principles and methods for moving people or goods by air, rail, sea, or road, including the relative costs and benefits.
6. Knowledge of materials related to procurement, production processes, quality control, costs, and other techniques for maximizing the effective manufacture and distribution of goods.
7. Knowledge of principles and procedures for personnel recruitment, selection, training, compensation and benefits, labor relations and negotiation, and personnel information systems.

8. Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, and coordination of people and resources.
  9. Skill in negotiation and facilitation.
  10. Skill in mediation and dispute resolution.
  11. Skill in completing assignments accurately and with attention to detail.
  12. Ability to analyze and solve work related problems.
  13. Ability to communicate effectively in both oral and written form.
  14. Ability to work successfully as a member of a team and independently with moderate supervision.
  15. Ability to train and supervise others.
  16. Ability to work collaboratively and build strategic relations with colleagues, coworkers, constituents and volunteers inside and outside of the organization.
  17. Ability obtain, combine, and organize information into meaningful patterns.
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<sup>i</sup> Possession of a **current** Certified Professional Public Buyer (CPPB) or Certified Public Procurement Officer (CPPO) from The Universal Public Purchasing Certification Council (UPPCC), or a current Accredited Purchasing Practitioner (APP) certificate, Certified Purchasing Manager (CPM) or Certified Professional in Supply Management (CPSM) from the Institute for Supply Management (ISM) or equivalent certifications may satisfy a portion of the above requirements.

<sup>ii</sup> Purchasing experience is defined as experience in which the major duty was the negotiation of price, quantity, and quality of goods and services with several vendors, whether for internal use or resale. Selecting items from a catalog or list for which the price, quantity, and quality have previously been negotiated is classified as ordering and is not qualifying.