



Purchasing Specialist I Purchasing Specialist II

Purpose of the role:

Under general supervision, performs a variety of duties in purchasing, receipt, and issuance of materials, supplies, and equipment for use by various City departments in accordance with City purchasing procedures; provides bid specifications; negotiates bids and contracts; maintains an adequate inventory level; arranges for the transfer or disposal of surplus property; maintains records and files; and performs related duties depending upon area of assignment which are either central purchasing, public works, or fleet.

Distinguishing Characteristics:

Purchasing Specialist I

This is the entry-level class in the Purchasing Specialist series. This class is distinguished from the Purchasing Specialist II by the performance of the more routine tasks and duties assigned to positions within the series including the less complex purchasing, inventory, and contract management functions. Since this class is typically used as a training class, employees may have little or no related work experience. Employees are expected to perform a variety of duties in learning to perform the full scope of duties assigned to the series. Advancement to the II level is based upon demonstrated proficiency in independently performing the full range of Purchasing Specialist duties and is at the discretion of the appointing authority.

Purchasing Specialist II

This is the full journey-level class within the Purchasing Specialist series. Work within this class is distinguished from the Purchasing Specialist I level by its complexity and full range of responsibilities. Employees at this level only 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. Positions in this class are alternatively staffed and are normally filled by advancement from the Purchasing Specialist I level, or when filled from outside, required prior related experience.

Essential Duties and Responsibilities:

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

- Researches, evaluates, negotiates, and contracts for equipment, supplies, materials, parts, general services, and special equipment through the informal or formal bid processes, Request for Proposal (RFP), use of cooperative purchases, or tagging onto other agency's bids in order to obtain the best possible products and services at the best prices.

- Receives, examines, analyzes, and processes purchase requisitions and purchase orders according to City and department policies and procedures; ensures that information is correct and complete and order parameters are clear and understood; corrects errors as necessary.
- Prepares bid specifications for formal and informal bids for equipment, annual contracts, materials, supplies and services; obtains bid quotations; compares costs and evaluates the quality and suitability of supplies, materials, and equipment; evaluates and summarizes bids; prepares recommendations for bid awards; prepares bid process documentation; selects appropriate vendors and purchases approved supplies, equipment and services used in City departments; maintains bid files, product files and appropriate records; and, generates reports as necessary.
- Confers with departmental representatives to determine purchasing needs, and resolves problems; resolves problems relating to substitutions, equivalents, delivery schedules, and vendor problems; follows up on purchase orders to ensure products are received in a correct and timely manner.
- Receives all incoming orders; verifies correctness, quantities, and distribution; coordinates shipping of parts, incorrect orders and exchanges; makes local parts runs and equipment repair deliveries.
- Maintains a stores inventory; disburses goods; maintains related inventory records, bid files, and product files.
- Negotiates, manages, and monitors contracts.
- Uploads bids or Request for Proposals to the City's purchasing website.
- Maintain vendor/bid files, commodity/sub-commodity lists, and other purchasing and inventory files.
- Arranges for the transfer or disposal of surplus property.
- Uses and trains staff in the use of applicable purchasing and/or inventory software as necessary; instructs and informs other staff in purchasing procedures and policies as necessary.
- As assigned, oversees preventative maintenance programs; performs preventative maintenance on equipment and parts; creates work orders and tracks equipment, parts, and contractor services used; generates purchase orders for approval.
- Answers inquiries and complaints by employees, vendors, and the public over the phone and in person; provides information within scope of knowledge and authority, or refers to supervisor.
- Maintains records and lists and develops reports and correspondence concerning purchasing activities.
- Participates in purchasing meetings and discussions; maintains awareness of new developments in the field of purchasing.
- If assigned to a warehouse, operates forklifts, trucks, and other light equipment in the storage of material, supplies, equipment, and parts.
- Purchasing Specialist IIs may provide direction and training to lower level staff.

- Performs related duties as required.

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

- Operations, services, and activities of a purchasing program.
- Materials, supplies, equipment, tools, used in the construction and repair of vehicles and motorized equipment, streets, sewers, and water utility systems and facilities.
- Inventory and stock control systems and methods.
- Practices and methods of public agency purchasing, including competitive bidding procedures.
- Applicable laws and regulations regarding governmental purchasing activities.
- Occupational hazards and standard safety practices.
- Sources and types of equipment and supplies used by a municipality.
- Methods and techniques of specification writing.
- Marketing practices and commodity pricing methods and differentials.
- Surplus disposal methods and practices.
- Methods and techniques of customer service.
- Principles and procedures of record keeping.
- Principles of business letter writing and basic report preparation.
- Office procedures, methods, and equipment including computers and applicable software applications.
- English usage, spelling, grammar, and punctuation.

***Desired
Minimum
Qualifications:***

Ability to:

- Read and interpret purchase requisitions, plans, drawings, and specifications.
- Translate user requirements into appropriate specifications.
- Analyze bids for their consistency with specification requirements.
- Evaluate quality and price of products to judge suitability of goods and alternatives offered.
- Maintain, analyze, evaluate, and account for an inventory.
- Exercise sound independent judgment within general policy guidelines.
- Draft clear, accurate, and concise specifications and other written materials.
- Understand, interpret, explain, and apply City purchasing policies and procedures.
- Prepare and maintain records and files.
- Operate office equipment including computers and supporting software applications.
- Work under steady pressure with frequent interruptions.
- Learn and apply new information or new skills.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Competencies:

- Team Builder
- Results Oriented
- Customer-Focused
- Accountable
- Technically Knowledgeable

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

Purchasing Specialist I:

Education:

Equivalent to the completion of the twelfth grade.

Experience:

One year of experience that included developing and maintaining financial or statistical records.

Purchasing Specialist II:

EITHER-

Experience:

One year of experience as a Purchasing Specialist I with the City of Thousand Oaks;

OR -

Education:

College level coursework (at least 15 semester units) in business administration, public administration, accounting, or a related field; and,

Experience:

Depending upon the particular vacancy, one year of progressively responsible experience in purchasing a variety of supplies, materials, parts, services and equipment in the required field: general purchasing; automotive and equipment parts; or public works supplies and materials.

Both Levels:

Licenses; Certificates; Special Requirements:

A valid Class C California driver's license is required.

A valid forklift license is preferred.

**Education and
Experience
Guidelines:**

**Physical and
Environmental
Conditions:**

Physical: Primary functions require sufficient physical ability to work in an office or warehouse setting and operate office equipment; perform duties requiring grasping, repetitive hand movement, and fine coordination. When assigned to a warehouse, primary functions require sufficient physical ability to work indoors and outdoors; sit, stand, walk, reach, twist, turn, kneel, bend, squat, and stoop; lift, carry and push tools, equipment and supplies weighing 50 pounds or more; drive motorized vehicles.

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Vision: See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate office equipment. **Hearing:** Hear in the normal audio range with or without correction.

Environment: Depending upon assignment, work is either in standard office setting or in a warehouse. If assigned to a warehouse, work is in an indoor and outdoor environment working near moving mechanical parts; exposure to noise, dust, fumes, and inclement weather conditions including wet and/or humid conditions; interaction with City staff, vendors, and suppliers, and employees.

*Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not include all** duties performed by individuals within a classification. In addition, specifications are intended to outline the **minimum** qualifications necessary for entry into the class and do not necessarily convey the final qualifications of incumbents within the position.*

Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.

Date Adopted: 7/5/03

Date Revised: 8/04