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HR/PCOS 2013-06

To: Human Resources Officers

From: Evelyn Nazario 
Associate Vice Chancellor
Human Resources Management & CO HR Services

Subject: **Campus Review – Draft Purchasing Technician, Buyer Series, and Contract Analyst Classification Standards (Unit 7)**

Overview

Audience: Human Resources Officers, Classification/Compensation Managers, and campus management responsible for purchasing and buyer operations

Action Item: Review draft classification standards and provide feedback by November 22, 2013

Affected Employee Groups(s)/Unit(s): Employees in Buyer classifications in Unit 7, and employees performing purchasing and contract analysis work

Summary

This Technical Letter provides an overview of the new Purchasing Technician, Buyer Series, and Contract Analyst Classification Standards and requests your review and feedback of the proposed drafts. The proposed classifications in this study include: Purchasing Technician, Assistant Buyer, Buyer, Senior Buyer, and Contract Analyst.

Study Background: Significant changes in the practices, regulations, and technology related to the field of purchasing prompted both management and CSUEU to request a study of the following classifications:

- Buyer Trainee (*Non-Exempt*)
- Buyer I (*Non-Exempt*)
- Buyer II, Lead Buyer II (*Non-Exempt*)
- Buyer III, Lead Buyer III (*Non-Exempt*)

The proposed draft classification standards were developed based on the results of an internal campus needs assessment survey, analysis of campus position descriptions, and review by campus experts in the purchasing area and human resources representatives. The proposed Buyer Series will replace the above mentioned classifications. The Buyer Trainee classification has been eliminated due to low campus usage. Lead functions have been incorporated into the proposed Buyer classifications. The Purchasing Technician and Contract Analyst classifications have been created to accommodate this additional body of work that is being performed in the purchasing area. **Please note:** The FLSA exemption status of the Senior Buyer and Contract Analyst classifications

Distribution:

CSU Presidents
Vice Chancellor, Human Resources

All Vice Presidents
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is exempt. The duties of these classifications satisfy the U.S. Department of Labor's administrative exemption criteria.

Highlights of the Proposed Classification Standards:

The following **new** classifications are proposed:

• **Purchasing Technician (Non-Exempt)**

The Purchasing Technician performs the full range of routine purchasing and administrative support activities.

• **Buyer Series:**

Assistant Buyer (*Non-Exempt*) Performs routine purchasing within a limited delegated authority.

Buyer (*Non-Exempt*) Performs the full range of purchasing work within a moderate delegated authority.

Senior Buyer (*Exempt*) Performs advanced journey buyer work, including the negotiation of complex terms and conditions, and has considerable delegated authority.

• **Contract Analyst (Exempt)**

The proposed Contract Analyst classification is the technical expert for administering complex and/or customized contracts.

Campus Review: The draft classification standards are attached. Your review and feedback is critical to the development of the final classification standards and assists us in ensuring that the new classifications meet operational needs of the campuses. As you review the drafts, please consider the following:

- Do the proposed classification standards adequately cover the breadth of work performed by incumbents today and potentially for the next five years?
- Are the distinctions between the classifications clear and properly defined?
- Are there any critical core functions or work activities missing? If yes, please provide them.
- Are there any critical knowledge, skills and abilities missing? If yes, please provide them.
- Is the language in the classification standard flexible enough to accommodate ongoing changes in the industry and the differences in campus operations systemwide?

Sending in Feedback: Thank you in advance for your time and effort in reviewing the draft classification standards. We look forward to hearing from you by **November 22, 2013**. We request that campus human resources coordinate their response with the appropriate campus management and submit consolidated feedback. Please provide written comments to Charlene Tsunezumi, Manager, Compensation, via email to ctsunezumi@calstate.edu.

Next Steps: Campus feedback will be reviewed and revisions will be made, as appropriate, after reviewing with the management advisory group. Salary ranges and impact to employees are subject to collective bargaining and will be addressed after the classification standards are finalized. Campus HR will be consulted and updated throughout the process.

Should you have questions regarding this technical letter, please contact Charlene Tsunezumi in Human Resources Management at (562) 951-4344. This HR memorandum is also available on the Human Resources Management's Web site at: <http://www.calstate.edu/HRAdm/memos.shtml>.

EN/ct

Attachment

Draft – Classification Standard – 10/14/13

Purchasing Technician

Class Code: **xxxx**
Issue Date: **xx-xx-xxxx**
FLSA: **Non-Exempt**

OVERVIEW:

Purchasing Technicians provide technical and administrative support in the procurement of equipment, materials, supplies and services to a centralized campus purchasing department. Under immediate supervision, incumbents follow established policies, procedures and practices and independently perform a full range of routine purchasing and administrative support activities.

The Purchasing Technician is distinguished from the Administrative Support series by a primary responsibility for performing routine purchasing support duties. The Purchasing Technician is distinguished from the Buyer series in that the Technician has the primary responsibility for performing routine purchasing and administrative support activities and does not have delegated purchasing authority.

TYPICAL ACTIVITIES:

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this classification.

Purchasing Technicians typically perform duties that include some or all of the following: verify price and availability of goods; review and process purchase requisitions; prepare purchase orders; process blanket purchase orders; enter and maintain data into purchasing system; expedite orders; follow through on orders until goods are received; monitor status of purchase requisitions and purchase orders; receive and log incoming bids; track correspondence, documents and contracts; contact campus departments, vendors and organizations to obtain information; maintain files, records and program manuals; perform mathematical calculations; resolve invoice discrepancies; respond to routine inquiries regarding forms and processes; submit purchase orders for payment; reconcile invoices; run routine reports; use current computer word processing, spreadsheet, and database software programs, web browsers, query tools, and integrated financial systems; and perform administrative functions, such as data entry, answering phones, filing, and scheduling meetings.

MINIMUM QUALIFICATIONS:

Knowledge:

Working knowledge of principles and practices relating to purchasing management, and general office methods, procedures and practices.

Abilities:

Ability to analyze, interpret and apply policies, procedures and practices; communicate effectively; organize and prioritize workload; accurately enter data and maintain files; establish and maintain effective working relationships with others; read and write at a level appropriate to the position; and use computer word processing, spreadsheet, and database software programs, web browsers, query tools, procurement management systems, and integrated financial systems.

Experience:

Equivalent to three years of experience performing a combination of purchasing support and administrative duties, which includes one year of experience preparing purchase orders and processing purchase requisitions.

Education:

Equivalent combination of education and experience which provides the required knowledge and abilities.

Draft – Classification Standard – 10/14/13

Buyer Series

Class Title	Class Code	Issue Date	FLSA
Assistant Buyer	XXXX	XX-XX-XXXX	Non-Exempt
Buyer	XXXX	XX-XX-XXXX	Non-Exempt
Senior Buyer	XXXX	XX-XX-XXXX	Exempt

OVERVIEW:

The Buyer series is comprised of positions responsible for the procurement of supplies, materials, equipment, and services. Incumbents perform purchasing related duties within a centralized campus purchasing department, work with specific delegation of purchasing authority, and are agents of the university with respect to purchases made in accordance with state and federal regulations and laws, campus and CSU policies, procedures and practices.

Positions are assigned to classifications within the series on the basis of the scope and complexity of purchasing activities; degree of independence; knowledge and ability required; degree of planning, analysis, and execution required by the position; and nature of supervision received. All positions ensure compliance with state and federal regulations and laws, campus and CSU policies, procedures and practices; and require the ability to establish and maintain cooperative working relationships; communicate effectively with others; organize and prioritize work; exercise sound judgment within area of responsibility; perform mathematical calculations; investigate and resolve purchasing-related inquiries and problems; and use current computer word processing, spreadsheet, and database software programs, web browsers, query tools, procurement management systems, and integrated financial systems.

This series is distinguished from other series by a primary responsibility for functions unique to the purchasing area such as processing contracts for purchase of supplies, materials, equipment, and services; expediting, making purchases using competitive bidding, and a working knowledge of commodity markets. Incumbents of this series have delegated purchasing authority.

Assistant Buyer – Entry classification to professional buyer series. Work is generally limited in scope and performed within established guidelines. Performs routine purchasing of supplies, materials, and equipment, and has limited delegated purchasing authority. Routine purchases are single items or items where specifications and volume have been established or are common items available from a variety of established sources in the marketplace.

Buyer – Incumbents work within established procedures to perform a full-range of purchasing duties and have moderate delegated purchasing authority. Judgment is required in interpreting established policies, procedures, practices and guidelines. Purchases are typically less technical and/or low dollar values.

Senior Buyer – Performs advanced journey level purchasing work which involves technical and/or complex purchases of high dollar values, and integrate many diverse elements. Negotiates terms and conditions for favorable outcomes, and has considerable delegated authority to approve purchase orders up to designated amount. The majority of work assignments are at the advanced journey level.

TYPICAL ACTIVITIES:

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this classification.

Buyers typically perform duties that include some or all of the following: purchase supplies, materials, equipment, and services; perform cost analysis; write specifications; solicit price quotations; develop lists of qualified suppliers; perform product research and pricing; prepare delivery terms and conditions for bidders; prepare timetables for bids; advertise bids; hold public openings of bids; analyze bid responses; direct payment requests for compliance with purchasing criteria; identify repetitive commodity buying patterns for possible university-wide contracts; develop business processes; administer a campus program; recommend policy and

procedure changes; conduct campus training; validate insurance requirements; prepare reports and correspondence; maintain files and records; provide recommendations on contracts exceeding delegated authority; administer and manage a campus program.

ASSISTANT BUYER

The Assistant Buyer is the first level of professional purchasing work and requires general knowledge of purchasing practices and procedures. Incumbents work under immediate supervision, and perform routine purchasing of supplies, materials and equipment within established guidelines.

Work assignments typically include some or all of the following: perform routine purchases; administer informal solicitation process; conduct product research and pricing; review transactions and documentation for compliance; provide information to others regarding procurement process; enter purchasing data; assist with other purchasing activities such as bid solicitation process and preparation of contracts and agreements; provide training, guidance and assistance to other employees; and may provide work direction to other professional and/or technical staff.

MINIMUM QUALIFICATIONS:

Knowledge:

General knowledge of purchasing practices and procedures; state and federal laws and regulations, campus and CSU policies, procedures and practices applicable to campus procurement; competitive bid administration; and general accounting principles as related to purchasing and contracts.

Abilities:

Ability to perform routine purchasing and electronic ordering; conduct product research; gather and analyze data and reach sound conclusions; understand, interpret, and explain applicable laws, codes, guidelines and procedures; and apply problem solving techniques.

Experience:

Equivalent to one year of purchasing experience as a buyer in a competitive bid environment or in the administration of contracts and agreements.

Education:

Equivalent to a bachelor's degree in purchasing, marketing, accounting, business or related field, or a combination of education and experience which provides the required knowledge and abilities.

BUYER

Under general supervision, Buyers work independently to perform the full-range of professional purchasing activities requiring thorough knowledge of purchasing federal and state laws and regulations, CSU policies, procedures and practices, and vendor relations.

Work assignments typically include some or all of the following: administer informal and formal solicitation process and request for proposal process; develop and implement master purchasing agreements, standard contracts, professional service agreements for large volume requests; evaluate vendor performance; recommend action on vendor performance; analyze purchasing transactions for potential standardization; identify opportunities to negotiate or competitively procure cost saving alternatives; consult with departments in developing specifications; research market trends; recommend new products; analyze purchase options; conduct cost comparisons; analyze bids and award contracts; resolve bid protests; monitor contracts and agreements; provide training to campus and vendors; develop manuals; review and audit programs; provide training, guidance and assistance to other employees and may provide work direction to other professional and/or technical staff.

MINIMUM QUALIFICATIONS:

Knowledge:

Thorough knowledge of purchasing practices and procedures, including specification writing; competitive bid administration; state and federal laws and regulations, campus and CSU policies, procedures and practices

applicable to campus procurement. Working knowledge of contract development procedures; industry standard policies and practices for common contracts, service agreements and leases; and general accounting principles as related to purchasing and contracts.

Abilities:

In addition to those of Assistant Buyer, the ability to research and organize data; evaluate quality and prices to determine best value; develop, analyze and evaluate routine bid proposals, purchase requisitions, specifications and other purchasing-related documents; perform cost analysis; administer competitive bid process; and analyze bid proposals and recommend awards.

Experience:

Equivalent to three years of progressively responsible purchasing of general goods and services, and bid administration.

Education:

Equivalent to a bachelor's degree in purchasing, marketing, accounting, business or related field, or a combination of education and experience which provides the required knowledge and abilities.

SENIOR BUYER

Under general supervision, Senior Buyers perform advanced professional purchasing work that is technical and/or complex in nature, requiring independent judgment and initiative in the preparation and review of specifications, contract development, and bid administration.

Work assignments typically include some or all of the following: develop complex specifications and request for proposal documents with minimal input from requestors; conduct research for cost-effective methods of procurement; negotiate complex terms and conditions; facilitate bid solicitation process; analyze bids and award contracts; prepare contract documents; review and approve agreements; provide technical advice and consultation to campus; provide training to campus and vendors; serve as liaison with vendors, agencies and other organizations; make recommendations to business processes and practices; make recommendations on contracts exceeding delegated authority; may assist with long term planning; and may provide lead work direction to other professional and/or technical staff.

MINIMUM QUALIFICATIONS:

Knowledge:

Comprehensive knowledge of purchasing practices, principles and procedures; competitive bid administration; state and federal laws and regulations, campus and CSU policies, procedures and practices applicable to campus procurement. Thorough knowledge of contract development procedures; industry standard policies and practices for contracts, service agreements, and leases; advanced professional purchasing, technical and/or complex procurement; negotiation principles; and general accounting principles as related to purchasing and contracts.

Abilities:

In addition to those of the Assistant Buyer and Buyer, the ability to negotiate complex terms and conditions; develop, interpret, and apply technical specifications and service requirements; perform cost analysis; and present technical information clearly.

Experience:

Equivalent to five years of progressively responsible purchasing and bid administration experience, of which three years must have involved writing specifications in support of competitive bidding or contract development.

Education:

Equivalent to a bachelor's degree in purchasing, marketing, accounting, business or related field, or a combination of education and experience which provides the required knowledge and abilities.

Draft – Classification Standard – 10/14/13

Contract Analyst

Class Code: **xxxx**
Issue Date: **xx-xx-xxxx**
FLSA: **Exempt**

OVERVIEW:

Contract Analysts serve as the technical expert for contracts and agreements. Incumbents are responsible for contracts and projects that are complex, unique, high cost and involve the negotiation and development of special specifications. The complexity of these contracts and projects involves a combination of variables which add to the difficulty of the solicitation, evaluation, negotiation and award processes and require a high degree of judgment in execution. Considerable judgment is required to interpret established policies, procedures, practices and guidelines, and in applying concepts which may deviate from traditional methods and practices.

Under general supervision, incumbents negotiate terms and conditions, prepare and review documents to ensure compliance with state and federal regulations and laws, campus and CSU policies, procedures and practices, make appropriate amendments to documents, and assess risk to minimize liability exposure. Incumbents have delegated authority to award contracts, and enter into long term agreements and leases.

TYPICAL ACTIVITIES:

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this classification.

Contract Analysts typically perform duties that include some or all of the following: negotiate complex, customized contracts requiring development of unique specifications; advise on interpretation of contracts and agreements; bid development, evaluation and award; prepare contracts, agreements and documents; review documents; draft modifications and amendments to contracts; administer a campus program; monitor projects; develop guidelines and procedures; prepare reports and correspondence; serve as liaison with vendors, agencies and other organizations; resolve problems and issues with vendors and agencies; recommend changes to business processes and practices; conduct training; provide input on contracts and agreements exceeding delegated authority; participate in long-term planning; serve as project leads, and may also provide lead work direction to other professional staff.

MINIMUM QUALIFICATIONS:

Knowledge:

Comprehensive knowledge of procurement solicitation methods, and contract management methods; federal and state laws and regulations, CSU policies, procedures and practices relating to contracts, insurance and risk management; construction methods, practices and procedures; public works administration; negotiation principles; and contract language. Thorough knowledge of risk management; insurance and bonding requirements; and general accounting principles as related to purchasing and contracts.

Abilities:

Ability to negotiate complex terms and conditions; assure that contracts and agreements meet compliance requirements; develop, review and manage contracts and agreements; analyze and interpret contract terms and conditions; prepare and analyze complex contract specifications and bid solicitations; interpret complex data and determine appropriate course of action; resolve complex legal issues pertaining to contract specifications, insurance, risk and liability; develop timelines for contracts and projects; prepare reports, correspondence and documents; establish and maintain cooperative working relationships; communicate effectively with others; present technical information clearly; perform mathematical calculations; and use current computer word processing, spreadsheet, and database software programs, web browsers, query tools, procurement management systems, and integrated financial systems.

Experience:

Equivalent to six years of progressively responsible contract administration experience, which includes negotiating of terms and conditions, procurement solicitation methods, development of contracts, service agreements, leases or other written agreements.

Education:

Equivalent to bachelor's degree in public administration, business administration, or related field; or equivalent combination of education and experience which provides for the required knowledge and abilities.