

Oak Grove School District

JOB TITLE: **PURCHASING AND FINANCIAL TECHNICIAN**

DESCRIPTION OF BASIC FUNCTIONS AND RESPONSIBILITIES

To coordinate the District's ordering and purchasing calendar; to assist in the implementation of purchasing policies and programs of the District; to establish and maintain vendor files; to assist in establishing product and service specifications, monitoring of purchasing and bidding practices and procedures; to prepare cost and price analysis, capital project analysis, lease or buy analysis and project feasibility studies, if necessary; and to perform other job-related duties as required. This job classification receives general to limited supervision from the Purchasing Supervisor or his/her designee and within a framework of standard policies and procedures. This job class requires a high degree of technical and specialized knowledge and skills in purchasing and finance. This job class also requires the utilization of initiative and problem-solving skills.

TYPICAL DUTIES

- Compiles and analyzes bids and related statistical data
- Matches warehouse receipts against purchase order purchases and checks out price discrepancies.
- Initiates actions to correct discrepancies as rated on warehouse receivers and vendor invoices; forwards audited and completed packages to accounts payable for processing of payments
- Maintains the purchase order and encumbrance files in the general ledger system; encumbers, corrects or deletes purchase orders in the systems.
- Maintains the District vendors file; adds, deletes and changes vendor names, remittance, addresses and vendor codes to and from the file.
- Maintains files for theft claims; tabulates charges by location; forwards copies of vandalism reports to MOT for needed repairs or replacement.
- Performs cost and pricing analysis, capital project analysis, lease or buy analysis and project feasibility studies, if necessary; determines if outside consultants are needed in view of expertise and extend of analysis to be made and prepares requests for proposals.
- Prepares purchase orders from requisitions or stock reorder cards.
- Monitors and oversees the on-line ordering process for office and instructional supplies
- Provides training, support. and written communications to changes or additions to the program
- Audit and manage pricing issues
- Reviews warehouse stock levels and compares with projected stock consumption; establishes economic order quantities and reorder points, if necessary
- Reviews inventory listings for obsolete items; determines disposition of obsolete items
- Handles standard inquiries and requests from schools and district offices pertaining to ordering, purchasing, bidding and related functions
- Conducts telephone inquiries with vendors to obtain product information and quotes.

Approved by Board of Trustees August 9, 2001

TYPICAL DUTIES (Continue)

- Assists in devising and implementing programs and procedures covering requisitioning, ordering, purchasing, and receiving procedures
- Performs other related duties as required

MINIMUM QUALIFICATIONS

- Knowledge of proper office methods and procedures
- Knowledge of the California State School finance laws and regulations
- Knowledge of the purchasing and bidding principles and practices as required by the Education Code, State Contract Purchasing, and Administrative Code books
- Knowledge of the basic Uniform Commercial Code as it applies to laws on commercial contracts
- Knowledge of basic accounting and finance as it relates to cost and pricing analysis, present value analysis, and accounting ratio analysis
- Knowledge of data processing and its uses as it pertains to data entry and report processing of purchasing and spreadsheet applications
- Skill to operate office equipment and machines including but not limited to computer terminals, typewriters, and calculators
- Skill to effectively communicate in both oral and written form
- Skill to establish and maintain effective work relationships with those contacted in the performance of required duties
- Ability to learn Internet online ordering procedures for vendors in an on-line ordering program