

## PURCHASING AND RECORDS SPECIALIST

Classification: Administrative – Central Office

Location: Assigned Department

Reports to: District Administrator

FLSA Status: Non-Exempt

Bargaining Unit: OSEA

This is a standard position description to be used for positions with similar duties, responsibilities, classification and compensation. Employees assigned to the position description may or may not perform all of the essential functions indicated in this position description.

This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

### **Part I: Position Summary:**

This position is responsible for providing fiscal, clerical and administrative support to support the District's purchasing program for supplies and services.

### **Part II: Supervision and Controls over the Work:**

The Purchasing and Records Specialist works under the supervision of a District office administrator(s). Work is controlled and/or guided by State statute and State administrative code, professional practice, District policies and procedures, and directions and expectations as established by the administrator(s).

### **Part III: Major Duties and Responsibilities (depending on specific assignment):**

1. Coordinates District Purchasing Card program, including creating training materials and training all levels of staff, creates and maintains user profiles, creates reports, creates and maintains spreadsheets, audits budget codes and expenses, monitors for fraud, and reviews and maintains authorization limits. Reviews transactions for adherence to procurement policies and to identify fraudulent activity for corrective action. Maintains Merchant Category Codes. Point of contact with purchasing card banks to manage fraud and initiate updates.
2. Maintains District Vendor database. Reviews and approves district-wide requests for new vendors, including ensuring W-9 is received and 1099 information is recorded correctly. Interprets IRS guidelines related to 1099s and coordinates with Fiscal Operations as needed. Reviews and processes vendor database changes including using various methods to identify fraudulent requests. Responsible for the integrity of the vendor database including consistent database standards, initiating inactivation of dormant vendor records on an approved schedule, and

3. Supports the public records process. Maintains the public records log. Documents and tracks all dates relevant to public records request timelines. Prepares written cost estimates in connection with public records requests in accordance with state law and district policies. Collaborates with district personnel to ascertain the volume and nature of responsive records. May assist with collection of records in response to public records requests. Identifies potential confidential, exempt, and sensitive information in responsive records for further review. May assist with redaction of confidential, exempt, and sensitive information as directed. Consults with State Archives and Records and State Public Records Advocate as needed.
4. Processes and corrects purchase orders following District procedures and coordinates work with vendors and customers to confirm details and solve problems.
5. Processes purchase order change requests according to District policies and NCSD Public Contracting Rules. Ensures proper approvals are received for changes and identifies and escalates potential compliance issues.
6. Conducts informal solicitations for goods. Contacts vendors and contractors regarding quotations, purchase orders, shipping information, dates, insurance certificates, bond requirements and contracts. Ensures work follows state and District requirements.
7. Audits District employee reimbursement requests and provides guidance to all District staff on reimbursement policies. Identifies and escalates ongoing concerns with policy or policy compliance.
8. Records and compiles various types of data (financial, inventory, printing, communication devices, and purchase orders), manually and/or by computer; creates various reports on a regular basis.
9. Assists with contacting vendors and District officials to clarify questions on bids and purchase orders.
10. Supports district-wide record archiving by serving as a resource to all departments on statewide rules and district policies. Facilitates district archiving processes to assist with compliance with state requirements.
11. May compose materials including reports, correspondence, announcements, notices and memorandums. Proofs material for accuracy of format, grammar, typing and compliance with procedural instructions.
12. Conducts employee training to all levels of staff on the District's purchasing and requisition processes and software.
13. Contract administrator for various district-wide contracts. Provides support for departments utilizing contract, ensures billings are accurate and paid promptly, and serves as liaison between vendor and departments in resolving contract issues.
14. Coordinates district-wide surplus program including inter-building transfers, maintaining surplus inventory and online surplus inventory database, coordinating declarations and bills of sale, managing on-line auctions and pick-up of sold items. Requires extensive coordination and

negotiation with staff across the District including working closely with warehouse staff regarding moving and storage needs and scheduling.

15. Assist the Director of Business Operations with administrative support.

Perform other duties as assigned.

#### **Part IV: Minimum Qualifications:**

Incumbents must have successful experience in working with culturally diverse families and communities, or have otherwise demonstrated a commitment to strengthening engagement of a diverse community and skill in communicating with a diverse population.

- Possess an Associate degree in business or public administration, accounting, information management, or closely related field.
- Possess a valid state driver license.
- Minimum of two (2) years job related experience which demonstrates ability to work independently, with a minimum of supervision and function in a dynamic, fast paced, continually changing environment with frequent interruptions; skill competence and substance of work experience will be considered in determining applicant qualifications.
- A Bachelor's degree in business or public administration, accounting, information management, or closely related field may be substituted for the years of related experience.
- Experience which demonstrates excellent customer service abilities, interpersonal skills, team player attitude, and the ability to manage situations.
- Experience which demonstrates excellent problem solving, analytical, and conflict resolution skills and ability to think quickly.
- Experience which demonstrates a high level of attention to, and management of, detailed information.
- Experience which demonstrates strong organizational skills and the ability to meet deadlines.
- Experience which demonstrates excellent written communication skills and which demonstrates the ability to compose and proof correspondence.
- Working knowledge and demonstrated intermediate or higher experience with email and Microsoft Office programs, including Word and Excel.
- Experience which demonstrates working with numbers and knowledge of fiscal procedures is preferred.
- Ability to interpret written/oral directives and to apply state law and district rules, regulations, procedures, and policies.

- Demonstrated ability to understand, recognize, and protect highly confidential information.
- Ability to effectively communicate with and appreciate individuals from diverse, socio-economic backgrounds.
- Ability to operate office machines/equipment, to include-computer, multi-functional printer and telephone.
- Ability to provide customer service and collaborate professionally with the public, business and community groups, as well as building and district administrators and staff.

**Part V: Desired Qualifications:**

- Experience with the District’s financial management system or other similar system.
- Experience with public purchasing.
- Knowledge or and/or experience with Oregon public records laws and state archiving requirements.
- Bilingual and bicultural skills.

**Part VI: Physical and Environmental Requirements of the Position:**

The physical demands and work environment described here 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 functions.

- While performing the duties of this job, the employee is frequently required to sit, talk, lift, carry, move about, hear and speak. Employee may be required to perform extensive work at a computer display terminal.
- The employee may occasionally lift and/or move 25 to 50 pounds.
- Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.
- Employee may be required to interact with clients, customers, and staff who are emotionally upset, angry or distraught. In such interactions, employee must be able to maintain control and decorum and professionalism.