

NATOMAS UNIFIED SCHOOL DISTRICT

JOB DESCRIPTION

POSITION:	Purchasing Technician Lead	FLSA:	Non-exempt
DEPARTMENT/SITE:	Financial Services	SALARY GRADE:	17
REPORTS TO:	Chief Business Officer or Designee		

OVERALL OBJECTIVE AND SUMMARY

Performs specialized technical duties associated with the purchase, delivery, and quality of supplies, equipment, and services. Facilitates competitive pricing and/or bid processes for commodity and recurring stock items, maintains vendor relationships, and assists with inventory control and fixed asset accounting. The Purchasing Technician Lead is part of a procurement and purchasing career path. The Purchasing Technician Lead requires the ability to pre-screen vendors for price and service performance, analyze inventory trends to maintain adequate stock levels, and participate in developing bid documents. The Purchasing Technician Lead is expected to be capable of performing all of the requirements and job duties in the Purchasing Technician job description.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Essential responsibilities and duties may include, but are not limited to, the following:

- Performs technical accounting functions.
- Performs a variety of functions in purchasing including maintaining contact with vendors and processing purchasing requisitions.
- Utilizes technology/software/web-based systems in relation to the purchasing practices of the district. Assists District staff on the use of online purchasing systems.
- Receives and reviews requisitions. Requests quotations and bids. Compares and analyzes quotations and recommends bid awards on bids. Ensures product compliance with bid requirements, that the purchasing department handles directly.
- Interviews vendors for sources of supply, prices, product information, new products, standards, and service record. Researches price, quality, and availability of materials.
- Researches and prepares lists of vendors, professional associations, advertising sources, and other categories to support the bid announcement process.
- Creates and maintains vendor files containing contact information in conjunction with accounts payable.
- Reviews and discusses requisitioned goods and services listed with requestors. Researches products, prices, delivery, other related factors, and selects optimal vendors. Works with requestors to make changes or correct errors to requisitions, verify compliance with District policies and specifications, then forwards for preparation of purchase orders.
- Contacts vendors for the purchase of equipment, goods, and services, quantity, quality, and delivery within authority limitations. Procures urgent materials through the most effective means, considering quality, availability, cost, delivery time, and probability of continued support.

- Assists in tracking the status and handling of outstanding orders made to vendors either by way of internet or direct contact. Assures proper timing on release of orders.
- Maintains up-to-date knowledge of computer-aided purchasing systems. Orients others to its use and features.
- Responsible for coordinating the bid process; assists in preparing specifications; prepares packets; advertises bids; opens bid quotes.
- Assists with initiating 'calls-for-bids'. Prepares and assembles bid packages for approval. Discusses bid items with prospective bidders to gather information, as necessary, to write bid specifications.
- Prepares legal advertisements for bids and arranges for publication and mailing. Receives and evaluates bids on commodity and routine items and assists with reviews of items having technical specifications.
- Prepares, from standing procedures and instructions, contract documents, purchase orders, and special documentation for bonds, insurance, etc. Ensures proper authorizations before distribution.
- Responsible for annual and ongoing fixed asset inventory; maintains inventory database in collaboration with warehouse and information technology department. Selects appropriate equipment/item(s) to be included.
- May assist with determining and assuring adequate levels of inventory and reorder points for supplies and other items used on a regular basis throughout the District.
- Responsible for the year-end inventory process of reconciling the recorded versus physical differences. Documents transactions in order to support annual audits.
- Annually review and audit inventory, and coordinate with warehouse staff, to prepare necessary forms and documentation for disposition of District surplus property. Update inventory system as appropriate.
- Collaborates with warehouse staff on a weekly basis to problem solve delivery issues with vendors, communicate asset inventory issues, expectations, and timelines.
- Enters and updates data on new vendors into databases or files using established data entry screens and templates.
- Process incoming requisitions. Proofreads, codes, and enters information into databases or files used for purchasing with links to accounting. Converts requisitions into purchase orders. Obtains required signatures and mails to appropriate vendors and District personnel.
- Receives and reviews requisitions. Requests quotations and bids. Compares and analyzes quotations and recommends bid awards on bids. Ensures product compliance with bid requirements.
- Communicates with management and District personnel, vendors, and contractors for the purpose of fulfilling District needs by coordinating activities and programs, resolving issues and conflicts, and exchanging information.
- Conducts inquiries, interviews vendors, and analyzes price and market trends.
- Verifies that vendors are in compliance with District requirements for preferred status.
- Maintains active files of all purchasing contracts, noting outstanding balances, completed transactions, and work-in-progress.
- Distributes information to departments and sites. Prepares memos for communication to vendors or school site personnel. Opens and distributes general mail. Orders supplies for the department using approved sources.

- Responds to questions regarding purchasing policies and procedures by providing information and forwarding inquiries to others.
- Monitors approved contracts for commodity items for price, quality, and receipt according to specified terms.
- Receives forms from the warehouse that verify distribution of supplies and other merchandise to departments. Verifies that costs and quantities match to original records. Tabulates, prepares summary forms, and remits for accounting.
- May assist with receiving of merchandise to the District warehouse and/or directing shippers to the proper location, notifying others of delivery.
- Maintains furniture and equipment inventory for the purpose of maximizing District resources.
- Performs other duties as assigned that support the overall objective of the position.

QUALIFICATIONS

Knowledge of:

- Requires working knowledge of procedures used in contracting for and purchase of equipment, goods, and supplies.
- Requires a basic knowledge of the specification development process.
- Requires a working knowledge of special computer aided purchasing and purchase order systems as well as office productivity software, proprietary business software used by the District, and the internet.
- Requires a working knowledge of inventory management, including economic reorder points, accounting, and inventory.
- Requires in-depth knowledge of modern office methods, practices, and equipment pertinent to purchasing.
- Requires well-developed skill using the English language, grammar, spelling, punctuation, and proofreading/editing to prepare bid documents, professional correspondence, and reports. Requires sufficient communication skills to convey technical information to other departments and vendors.

Ability to:

- Requires the ability to perform all of the essential duties of the position effectively and efficiently with minimal supervision.
- Must be able to prepare technical bid documents from established formats and instructions.
- Must be able to plan and prioritize work to meet schedules and timelines.
- Requires the ability to use a personal computer to access and enter information into established data entry screens, format, and produce computer generated and typewritten documents, and research information stored on databases or the internet.
- Must be able to troubleshoot purchasing system problems.
- Must be able to learn, interpret and apply rules, policies, and procedures affecting District purchasing operations.
- Must be able to maintain detailed and accurate records.
- Must be able to communicate professionally and courteously with contacts in and outside of the District.
- Requires the ability to maintain productive and cooperative working relationships with others.

PHYSICAL ABILITIES

This position requires:

- Must be able to function indoors in an office environment engaged in work of primarily a sedentary nature.
- Requires ambulatory ability to sit for extended periods of time, to utilize computers and peripheral equipment, accomplish other desktop work, and to move to various campus locations.
- Requires the ability to use near vision to read printed materials.
- Requires auditory ability to carry on conversations in person and over the phone.
- Requires the ability to retrieve work materials from overhead, waist, and ground-level files.
- Requires manual and finger dexterity to write, use a pointing device and keyboard at an advanced rate, operate computer, and to operate other standardized office equipment, almost constantly requiring repetitive motions.

EDUCATION AND EXPERIENCE

College-level coursework in purchasing, materials management, or equivalent is desired, and 3 years of progressive experience in a purchasing or distribution environment that involves monitoring contracts, buying demand and commodity items for recurring use, and inventory control. Additional experience may substitute for some post-secondary education.

LICENSES AND CERTIFICATES

- Requires a valid California driver's license.