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Class Specification for the:

PURCHASING TECHNICIAN SERIES

Series Definition:

This class includes positions whose major responsibilities are in performing or supervising the purchasing for an agency or facility through informal means (below \$4,000) and who also provide technical support in purchasing exceeding \$4,000. The work requires the application of a substantive knowledge of purchasing laws, regulations, policies and procedures; a practical knowledge of common business methods, terms and practices as they apply to sales, prices, discounts, associated transportation and shipping costs; sources of information on vendors of supplies, materials, equipment and services common to the organization served; and the ability to make computations including percentages to verify extensions and discounts.

Positions in this series are primarily concerned with the actual purchase, lease or rent of supplies, materials, equipment, services, etc., for their organization through such means as purchase order, petty cash or charge accounts.

Work typically involves the receipt of requisitions, consolidation where possible, discussion of requirements with the user if the item desired or its characteristics are unclear, suggestion of alternatives of comparable use and functioning if applicable for better terms or price; purchasing the item if it is on the Department of Accounting and General Services (DAGS) price list or obtaining phone quotes and issuing appropriate documentation to the lowest quoter to make the actual purchase. For items which may be difficult to describe over the telephone, positions may use user-prepared specifications or may prepare informal specifications from user information and circulate "request for quote" forms to various vendors. Upon receipt of quotes, they then determine the lowest quote consistent with specifications and process the actual purchase. Positions typically, although not exclusively, are responsible for certifying or verifying the receipt of the purchased items and follow up on problems with the order such as shortages, overages, damages, items which do not meet specifications and obtain credit memoranda or other restitution from the vendor. They typically are responsible for checking and verifying invoices, re-computing extensions, verifying discounts, shipping costs, etc., and assuring that only the proper tax is applied.

Certain positions may also describe to users procedures for formal purchases and may provide assistance in drafting initial specifications which are used by DAGS Central Purchasing in the development of formal purchasing documentation.

Certain positions at the higher level carry out formal purchasing for routine items (i.e. in replenishing warehouse stores or in repetitive purchasing such as mass forms/documents). In such situations, there typically is no special or unusual requirement for the development of formal specifications for new/complex purchases. Work is typically based on precedent actions or clearly applicable guidelines and standard paragraphs or in accordance with specific instructions by the supervisor. While a position in this series may perform routine formal purchases on a continuous, regular basis, procurement professional trainees perform similar work as part of their training and development for higher-level assignments.

Many positions also assist the supervisor in developing or are responsible for developing procedures for purchasing, storekeeping or inventory management.

Positions in this field may also perform a wide variety of purchasing-related activities such as inventory maintenance, stores recordkeeping, keeping track of and issuing purchase order numbers, coding purchases, typing purchase orders, maintaining records of purchases made, maintaining account records and other general clerical tasks.

Positions in this series are differentiated from general clerical positions whose work may include some responsibility for preparing requisitions or actual purchasing in that the positions in this series must show at least 25% of time in the following substantive activities of the purchasing work: discussing requirements with users, discussing requirements with vendors and obtaining quotations, evaluating quotations and recommending or determining low bid, drafting specifications, studying catalogs, manuals and meeting and discussing new products with vendor representatives; following up on and resolving problems with purchases such as overages, shortages, unauthorized substitutions, materials not meeting specifications, etc. and related substantive tasks requiring in-depth knowledge of established rules, regulations, policies and procedures regarding purchasing for the organization, practices and operations of the field, and use of judgment and tact in resolving problems and protecting the interests of the organization for which the position works.

While the positions may show considerable variety in being assigned to perform other collateral supply work such as inventory maintenance and/or stores keeping, these added functions are not level-enhancing unless the nature and complexity of work exceeds that identified as purchasing per se. For the most part, actual inventory maintenance (i.e., recording and taking) is identified as within the general clerical series and typically at the complex clerical work level. Storekeeping duties should be assessed by reference to the stores clerk/storekeeper classes.

Certain positions may also be assigned to primarily verify invoices, code purchases and maintain records of purchase order numbers and other pertinent account records. In

such instances, consideration of the position as account clerks rather than purchasing clerks should be given. In instances where the work seems to be evenly divided between purchasing and accounts recordkeeping, an assessment of the overall orientation of the position (i.e. towards purchasing supplies or towards account recordkeeping) as viewed by management should be used to determine the series allocation if both areas of work are at the same level. Otherwise, the position should be placed in the series in which the higher level of work is performed.

Certain positions are primarily concerned with providing technical support in the preparation of formal contracts for large-scale purchasing but do not of themselves execute purchases. The primary requirement of such positions is for knowledge of technical contract terminology and procedures. In these instances, refer to the contract assistant series for allocation consideration.

Positions in this series are differentiated from professional purchasing positions in that professional positions are concerned with purchasing involving (a) analysis, fact-finding and preparation of detailed specifications, terms and conditions for complex purchases exceeding \$4,000 (invitation for bid); (b) contract administration and execution monitoring for purchases exceeding \$4,000 and the resolving of major problems thereto; and (c) significant professional advisory to management requiring purchases and the performance of specialized staff studies thereto (i.e. performing cost-benefit studies or life cycle costing studies; establishing and maintaining policies for purchasing for a department/facility; establishing standards for common use materials/equipment/supplies for the facility, etc.). See also the series definition for professional purchasing series.

Certain positions in this series may be concerned with the review of purchasing documentation or actions for correctness of the documentation prepared as well as the correctness of the actions taken by others and for providing advisory services on purchasing procedures and methods appropriate relative to the law and regulations. Such positions are assigned to this series since they require the application of comparable purchasing knowledge and skills.

The presence or absence of authority to sign off on purchase orders is not level-determining except to the extent that it implies (a) independence of actions and the nature of review imposed on the work and/or (b) the nature of authority over others' work.

The levels in this series are differentiated by differences in (a) the nature and variety of work; (b) the knowledge and abilities required; (c) the nature and extent of direct or indirect controls exercised by the supervisor; (d) the nature of the guidelines available and the judgment required in applying them; (e) the complexity of work performed; (f) the nature and purpose of personal contacts required; and (g) the supervisory skills required.

PURCHASING TECHNICIAN I

8A.571

Duties Summary:

Purchases a wide range of goods, supplies, equipment, services, etc., for an organization independently using informal purchasing methods; and performs other related duties as assigned.

Distinguishing Characteristics:

This class reflects responsibility for purchasing, renting or leasing a variety of supplies, materials, equipment and services for an organization primarily through telephone orders confirmed by purchase orders and also including other simplified purchasing methods such as petty cash, checking accounts or charge accounts. Work includes the review of requisitions and specifications submitted by users and following up on unclear specifications, recommending or discussing possible substitutes, and applying the specifications to products and alternatives to determine which products, services, etc., are acceptable, to certify or verify deliveries, etc. The work includes verification and computation of invoice extensions, discounts, shipping/transportation and other charges and following up with users and vendors to correct errors, obtain restitution or credit, etc. There is frequent contact with users, vendors and others in which tact is required to maintain effective harmonious working relationships and to assure that all vendors are treated fairly and equally.

Certain positions may also write purchasing specifications for written requests for quotes (RFQ). Specifications prepared for such RFQ's typically involve readily describable items (by brand name, trade name, simple nomenclature or simple descriptions of readily identifiable features such as quantity of contents, dimension, color, etc.) or, when more complex, are repetitive purchases involving precedents. Users provide the majority of the language and information included with relatively little requirement for the technician to question or clarify needs.

An incumbent in a position in this class may also occasionally perform formally advertised purchases of a simple, routine and repetitive nature similar to those purchases made by the preparation of RFQ described above and may also assist in formally advertised purchases of a more difficult nature by providing support clerical tasks such as gathering data, seeing to advertisement, typing, collating and distributing bid invitations, receiving bids, and responding to bidders' and others' inquiries regarding the purchasing action or procedures and requirements of formal purchases.

In addition to conducting purchasing independently as described above, a position may also supervise and direct the work of lower-level clerical positions who assist in the

processing of purchasing documents including performing such clerical work as screening requisitions to assure that they are properly filled out, typing purchase orders as directed, maintaining files and records, etc., and may supervise and/or perform inventory recordkeeping, physical inventory taking, surplus property storage and disposal, supplies storage and distribution functions. Where the level of the position's work in these areas exceeds that of purchasing, per se, as described in this standard, allocation should be to the appropriate general clerical or specialized class.

In addition to conducting purchasing independently as described above as a major assignment, a position in this class, typically located in a central purchasing or administrative office, may be responsible for (a) keeping track of and/or typing/issuing purchase orders for purchases made by outlying offices, and/or (b) reviewing purchases made by outlying offices to ensure documentation and other information is appropriate as per procedures, and/or (c) advising personnel of outlying offices regarding purchasing methods, changes in purchasing laws, rules and regulations, policies, etc. of the organization.

Work is performed under general supervision and within established guidelines, rules and regulations for governmental purchasing. A position in this class may be the only position designated within its location as performing the technical details of purchasing. Recourse for advice and assistance in these situations is available from the departmental central administration or purchasing office or the central purchasing agency.

Examples of Duties:

Receives, reviews and consolidates requisitions for economical purchasing; checks availability of items requested at storeroom; makes purchases from approved price lists; discusses requirements, specifications and alternatives with users; phones sources of supplies and gives complete description of purchasing requirements, obtains information such as possible substitutes, availability, costs, terms and delivery; drafts specifications for purchases to include requests for written quotes; issues purchase orders and finalizes arrangements for delivery; receives and inspects materials upon delivery for correctness of quantity and quality; follows up on orders by telephone and in writing to expedite delivery or to resolve discrepancies or problems in completing a purchasing action; assures that charges are made to proper funds and charge codes, assigning object codes according to usage and purpose of goods or services purchased; processes and transmits invoices for payments; prepares and submits purchase reports; serves as petty cash custodian; maintains records of requisitions, purchase orders, invoices and related correspondence; prepares and types acknowledgment letters to successful and unsuccessful bidders; forwards complex or formal purchasing requirements to central purchasing or refers to a higher-level position; provides instruction and information on inventory reporting procedures to property custodians and maintains

the agency's real property and equipment records and accounts; conducts and/or supervises periodic physical inventory checks and prepares appropriate reports; processes surplus property disposals; supervises and/or participates in maintaining the appropriate stock levels and in issuing supplies from a storage room or warehouse; plans best use of available storage space.

Knowledge and Abilities Required:

Knowledge of: Government purchasing statutes, principles, practices, and procedures related to simplified purchasing methods; general knowledge of the legal aspects of purchasing; practical knowledge of common business methods, terms and practices as they relate to purchasing concerns; sources of supplies and information on a variety of supplies, materials and equipment; for some positions, inventory recordkeeping practices and procedures, and supply storage and distribution principles, practices and procedures.

Ability to: Follow purchasing and, as appropriate, inventory recordkeeping and other supply-related procedures; use purchasing reference materials to determine appropriate supply sources and to accurately describe purchasing requirements; speak clearly; maintain effective working relationship with vendors and users; make arithmetic computations including percentage calculations; prepare routine correspondence; operate a typewriter, calculator and adding machine; and maintain files of purchasing records and reference materials.

PURCHASING TECHNICIAN II

8A.572

Duties Summary:

Purchases a wide variety of goods, equipment, supplies, materials, etc. for an organization independently where the nature of purchases made requires substantial use of written requests for quotations or the preparation of specifications for routine formally advertised purchases; and/or supervises and participates in purchasing work as described at the next lower level; and performs other related duties as assigned.

Distinguishing Characteristics:

This class reflects responsibility for the independent purchasing of goods, services and other requirements characteristic of the next lower level and in addition for performing work characterized by one or more of the following:

- A. Work in conducting formally advertised purchases of a routine nature as a regular assignment. The work at this level requires a technical, practical knowledge of the

procedures and documentation required for purchases requiring formal advertising. Work is limited, however, to one or more of the following situations:

1. Advertised purchasing is based on precedent specifications, formats and other documentation. The position's incumbent works with users regarding the purchase but the contact work is primarily concerned with the review of materials to determine continued applicability to current circumstances (e.g. quantity, time of service or delivery, etc.) and for making appropriate minor amendments and for carrying out and following through associated procedures (e.g. advertisement, receipt of bids, responding to routine inquiries, etc.).
2. Routine purchases in which the description of products desired are straightforward, readily describable by brand name, trade name, simple nomenclature or simple descriptions such as color, weight, length/width, etc.
3. Preparation of the first draft of specifications for new items or for items which require descriptions beyond the simple terminology described above but where the final development of specifications and follow-through is conducted by others (i.e. central purchasing agency). Work of this kind requires extensive interaction with users to clarify and properly describe for initial draft purposes the purchasing specifications and other associated documentation.

Technical questions, complaints and problems arising from formal bid documentation typically are referred for resolution; however, a position in this class may be asked to assist in the resolution of such questions or problems by gathering information, maintaining channels of communication among those involved, explaining procedural aspects of the process, responding based on precedents, etc.

- B. Work in conducting informal purchasing which involves a substantial requirement for developing complex specifications for written RFQ. Complex specifications are those exceeding characteristics described for the kind of specifications prepared at the lower level (Purchasing Technician I). Work of this level and nature involves in-depth discussions with the users to understand and clarify varied and specific characteristics of the product or service, etc. desired, study of catalogs, manuals, discussion with vendors and others to develop an understanding of the technical terminology, work processes and requirements of the desired product or service. Also involved are responding to questions on the details of the specifications, assisting the user in evaluating the comparability of quoted products to the specifications, determining whether substitutions proposed by vendors are

acceptable, determining the lowest acceptable quotes and processing the actual purchase.

- C. Work which includes supervising and participating in purchasing work comparable to that described at the next lower level.

Positions in any of the categories above may also supervise and participate in or perform inventory recordkeeping and taking, surplus property storage and disposal, supplies storage and distribution.

The nature of supervision given to positions in this class, guidelines available and nature and purpose of personal contacts, are the same as described for the next lower level.

Examples of Duties:

Discusses requirements, specifications and alternatives with users; discusses needs with and obtains information from vendors; studies catalogs and reads various background material related to purchasing requirements of the agency; drafts specifications, terms and conditions for invitation for bids based on readily available precedents or specific instructions or prepares an initial draft of specifications for a new item and refers to others for finalization of purchasing action; procures technical or unique supplies and equipment requiring written request for quotes; supervises and participates in informal purchases characteristic of the next lower level; issues purchase orders and finalizes arrangement for delivery; supervises or conducts inspection of materials upon delivery for compliance with purchase order or contract; reviews, supervises and/or participates in the follow up of orders to expedite delivery or to resolve discrepancies or problems in completing a purchasing action; revises operating procedures and recommends changes to policies; supervises and participates in other work described at the next lower level.

Knowledge and Abilities Required:

In addition to the knowledge and abilities required at the next lower level, positions in this class require:

Knowledge of: Requirements for written request for quotes and formally advertised sealed bid procedures; good knowledge of the legal aspects of purchasing; for some positions, good knowledge of inventory recordkeeping and/or supply storage and distribution principles, practices and procedures; and/or basic understanding of supervisory principles and practices.

Ability to: Discern critical factors in commodities and purchases in order to verify and reissue Invitations for Bids or to prepare written requests for quotes for complex or technical commodities etc.; prepare correspondence; some positions need the ability to supervise the work of others.

Due to the transfer of authority to the Department of Education to administer its own Civil Service System pursuant to Act 51 Session Laws of Hawaii 2004, this is an adoption of the class specifications for the Executive Branch Civil Service classes PURCHASING TECHNICIANS I & II by the Department of Education Civil Service system.

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