

PART I	DEPARTMENT OF EDUCATION STATE OF HAWAII .....	8B.650 8B.651 8B.652 8B.653 8B.654 8B.655
	Class Specifications for the:	

PROCUREMENT AND CONTRACTS SUPPORT SPECIALIST SERIES

This series includes all professional positions located in the centralized Procurement and Contracts program in the Department of Education the duties of which involve performing and/or supervising and managing the oversight for various methods of purchasing and contracting a wide variety of goods, services, and construction for the entire department through the use of formal purchasing methods requiring the analysis and development of detailed, technical bid specifications, solicitations, and contracts, ensuring compliance with applicable policies, procedures, rules, regulations and laws.

Positions in this series involve providing professional support services to all schools and offices in the Department of Education and are characterized by performing periodic review of procurement and contracts practices; providing assistance, guidance, and training in matters relating to procurement and contracting; developing and revising procurement and contracting policies and procedures; preparing and formalizing bid specifications, solicitations, and contract documentation for specific goods, services and construction as requested by schools/offices and/or for select commonly-used departmental commodities or services; issuing formal solicitations and awards in compliance with applicable laws and regulations; and serving as the Department of Education liaison to the State's Risk Management program.

Professional positions in this series are required to examine and analyze user requirements to gain an understanding of the various commodities and services and/or State programs and their functions in the development of specifications, which describe the required characteristics and reliability of products and/or services without unduly restricting or confining competition. Furthermore, positions are required to identify any problems or concerns with terms and conditions of the contract which may conflict with applicable policies, rules, regulations, and laws. They also provide advice and make recommendations as to the disposition of failures to fulfill contractual requirements and may provide information for litigation to resolve contract disagreements.

The extent to which judgment and analysis are required is dependent on the amount and kind of precedents available and the inherent nature of the purchase. The following levels have been identified:

Routine and Repetitive Purchases: These consist of simple purchases where direct precedents are available, such as in the renewal of a contract for the same service, for the

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same program of the same characteristics, terms, etc. Some review of pre-existing material is required to ensure currency and continuity but no substantial research, independent development of specifications and little or no amendment of overall documentation is required. Comprehension of the various commodities and services required by the Department of Education is limited.

Moderate Purchases: These are purchases for which there are indirect precedents, such as first time purchases of a specific commodity or service for a particular program, which had never been requested before. In this example, precedents of other commodities or services requested by other programs are available to provide the specialist with a general approach to the assignment, characteristics of the purchase, etc. or any purchase which is new or unique which does not meet the requirements for complex purchases, described below.

Complex/Specialized Purchases: Complex purchases require substantial initiative and judgment to determine essential descriptive and other criteria and to differentiate between users' needs and preferences. These purchases are relatively extensive and normally have the following characteristics:

## 1. New Purchases:

- a. Require substantial research (catalogs, discussion with vendors, reference texts, consultants, etc.) to determine the essential characteristics and features of the desired kind of product/service; and
- b. Have no direct or indirect precedents within the organization for the requested type of product/service to be purchased; and
- c. Require substantial discussion with users to clarify and identify needs and how they relate to requirements and features of the desired product/service; and
- d. Have one or more of the following added features:
  - 1) Consist of multiple features, functions or phases each of which requires description. Substantial skill is required in identifying essential requirements for each of these features or functions and to describe them clearly and adequately but to also avoid over-restriction of the product which may unreasonably restrict competition; and/or
  - 2) Involve scientific or technical equipment necessitating a description of characteristics in technical language which requires an understanding of the technical terminology used and the implications of technical characteristics on the product's functioning. Difficulty in determining essential characteristics as opposed to non-essential although desirable

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characteristics may also be a factor; and/or

- 3) Involve equipment of such size, scope or nature that extensive coordination with the user is required to identify and foresee special problems and needs such as site preparation requirements (e.g. special construction for placement, reinforcement, shielding, etc. may be required as well as special terms for shipment, transportation, maintenance, testing, payment) and to develop specifications accordingly; and/or
  - 4) Are of such cost and impact on the user's program (i.e. in the order of millions of dollars of expenditure for one purchase) that novel or special requirements are necessary to ensure bidders are financially or otherwise qualified to fulfill contractual requirements; and/or
  - 5) Involve critical delivery and quality requirements such that extensive study and questioning of the user's operations is required to identify problem areas and to write in safeguards for assured performance (e.g., purchasing and delivery of election ballots for which there are restricted time frames and for which perfect performance is mandatory); and/or
  - 6) Other comparable complexities.
2. Products for Which Precedents are Available:
- a. Products/services which tend to be unique to each user because user needs significantly and substantially affect the nature and characteristics of the purchase. Such products require a significant understanding of the user operations to assure adequate descriptions and coverage of essential features in the specifications. Examples of such products are computer or communications systems.
  - b. Products which are subject to such rapid technological change that previous research and precedents are outdated within short periods of time requiring continual re-researching to keep abreast of new developments and extensive contact with the user.
  - c. Other comparable complexities.

Levels in this series are distinguished on the basis of various combinations of the following classification factors, all of which may not be applicable to every level:

1. Nature and Variety of Work.
2. Nature of Supervision Received.
3. Nature and Purpose of Person-to-Person Work Relationships.

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4. Nature of Available Guidelines.
5. Nature of Recommendations, Decisions and/or Commitments Made.
6. Nature of Supervision Exercised Over Others.
7. Knowledge and Abilities Required.

PROCUREMENT AND CONTRACTS SUPPORT SPECIALIST I

8B.650

Duties Summary:

Under immediate supervision, receives initial orientation and training in the principles, statutes, techniques, work processes and procedures related to procurement specifications and contracting standards within a centralized procurement and contracting program; and performs other related duties as assigned.

Distinguishing Characteristics:

This is the entry level trainee in the series designed to receive basic orientation, instructions, and on-the-job training in the principles, techniques, laws, methodology and work processes pertinent to governmental procurement specifications and contracting standards. A position in this class reads a wide variety of resources to gain familiarity and knowledge of commodities and services needed by the Department of Education and performs simple, non-complex assignments under close supervision. Assignments are characterized as simple and repetitive with detailed instructions and close review of work in progress.

Examples of Duties:

Participates in the formal purchasing of simple and non-complex commodities and services; attends orientation and instructions sessions and receives on-the-job training in governmental procurement/contract work; performs assigned readings on laws, rules, regulations, policies, methodology and procedures relating to the Department of Education's procurement and contracting program; studies laws, rules, regulations and policies as they affect purchasing procedures; reads a variety of publications to gain familiarity and knowledge of commodities and services needed; interview appropriate individuals to gain an understanding of various commodities and services and/or State programs and functions; under close supervision, reviews existing specifications for consistency of language and format; drafts new specifications or modifies and recommends changes or revisions to existing specifications, terms and conditions to improve language or to incorporate special user requirements or new developments under close review; develops simple specifications for establishment of new price lists and performs routine purchasing activities; prepares procurement notices; tabulates and summarizes bid results, analyzes and evaluates simple offers to determine the most advantageous offer; prepares resultant contracts in accordance with laws, rules and regulations and with program objectives and requirements

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under close supervision; prepares price list addenda or renewals; prepares contract modifications and/or terminations according to laws, rules and policies; assists in identifying problems or concerns with terms and conditions of the contract; recommends additional terms and conditions after careful consideration of issues in consultation with supervisor; gathers information for/from vendors and provides clarification to questions/concerns regarding the execution of the contract; reviews certificates of compliance; maintains purchase files, catalogs, manuals; informs contract administrator on matters such as late delivery, over/shortage, delivery schedules; assists in preparation of required reports; collects and reviews contract encumbrances.

Knowledge and Abilities Required:

Knowledge of: Basic principles of economics related to supply and demand, procurement, contracting and specifications development; interviewing and researching principles, techniques and methods; proper English grammar, punctuation and word usage; arithmetic; report writing.

Ability to: Read, understand, evaluate, and explain applicable laws, rules, regulations, policies and other technical material related to government procurement and contracting standards; learn the principles and practices of governmental purchasing and the characteristics and sources of information and supply of assigned supplies, materials, equipment and services; learn, understand and apply the characteristics of various types of commodities and services; learn to develop and draft specifications; conduct effective interviews; establish and maintain good working relationships with vendors, technical consultants and operating agencies; deal tactfully and effectively with others; communicate effectively, orally, and in writing; and prepare clear and concise written reports and correspondence.

PROCUREMENT AND CONTRACTS SUPPORT SPECIALIST II

8B.651

Duties Summary:

As an advanced trainee, performs routine work in procuring and establishing standards and specifications for commodities and services within a centralized procurement and contracting program; and performs other related duties as required.

Distinguishing Characteristics:

This class reflects the advanced trainee through which the trainee advances as part of the progression to full performance as an independent worker. A position in this class performs a variety of routine assignments requiring some application of knowledge relating to governmental procurement specifications and contracting standards work.

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Supervision is relaxed on simple, routine and/or recurring procurement and contract administration assignments, and is initially close and immediate for moderately difficult assignments, decreasing to general supervision during the latter period at this level. Complex purchases are performed under close supervision to further professional development during the latter period at this level.

Examples of Duties:

Reviews contracts for compliance with applicable policies, rules, regulations and laws and provides technical assistance to program staff in the development, management, and execution of contracts; serves as departmental liaison with the Attorney General's Office and as coordinator between the Director's Office and the various programs in matters relating to contracts; advises and makes recommendations on issues related to routine contract formation and administration; serves as the liaison and technical resource for simple and routine procurement and contract administration issues; collaborates with internal and external staff to expedite the review and approval of contracts; assists in conducting fact-finding investigations and making recommendations in the event vendors fail to perform according to the contract terms and conditions; in addition, performs work described at the lower level applicable to routine work assignments.

Knowledge and Abilities Required:

In addition to knowledge and abilities required at the next lower level, must have:

Knowledge of: Purposes and format of commodities and services specifications and their sources of supply; laws, ordinances, rules and regulations governing governmental purchasing and contracting requirements; departmental policies and procedures relating to procurement and contracting.

Ability to: Accurately evaluate the quality and suitability of commodities and services; assess market conditions and price trends; conduct interviews, studies and develop specifications, terms and conditions for routine to moderately difficult formal actions.

PROCUREMENT AND CONTRACTS SUPPORT SPECIALIST III

8B.652

Duties Summary:

Independently performs moderately technical and complex work in procuring and establishing standards and specifications for commodities and services within a centralized procurement and contracting program; makes independent analysis of users' requirements and prepares appropriate specifications, terms and conditions; and performs other related

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duties as assigned.

Distinguishing Characteristics:

This is the fully independent worker level in the series. Work assignments range from routine purchasing and contracting activities through complex methods of analyzing and determining special, technical or unusual circumstances; however, the predominant work assignment is of a moderately technical and complex nature.

A position at this level uses experienced professional judgment and discretion to determine formal purchasing and contracting of moderately technical and complex projects; differentiate between needs and preferences of users, evaluate the quality and reliability of products and/or services, establish a fair and equitable method of evaluating bids, determine appropriate type of specifications to develop depending on the nature of purchase, and to resolve or recommend solutions to contract administration problems, etc.

Independently performs work on a day-to-day basis with only general supervision; however, the supervisor is consulted when clarification of new policies and procedures is required or when there are legal problems resulting from the interpretation of the specifications, terms and conditions of a particular contract or when unusual, unprecedented problems arise.

Examples of Duties:

Conducts the formal purchasing of technical and complex commodities, services and concessions; drafts letters of rejection for bids which do not meet the specifications, terms and conditions or other requirements; assists in reviewing and initially drafting specifications; determines a fair and equitable method of evaluating bids for each purchase; incorporates special, highly technical or unusual requirements regarding bidder qualifications or other factors as required; establishes and maintains extensive person-to-person contact within and outside of the program for the purpose of providing information and clarification regarding the terms and conditions of the contract; assists in interviewing vendors to ascertain their reliability and the quality of the commodity or services offered; maintains thorough knowledge of current laws, rules, policies, regulations and procedures governing the department's centralized procurement and contracting activities; studies laws, rules, regulations, and policies as they affect purchasing procedures; clarifies and explains provisions of existing laws, rules, regulations and policies regulating departmental purchases; provides information to department offices and the general public on procurement and contracting procedures and the governing laws, rules and regulations; assists with the development of a department-wide procurement and contracts training program; in addition, performs work described at the lower level in relation to moderately technical and complex work assignments.

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Knowledge and Abilities Required:

In addition to knowledge and abilities required at lower levels, positions at this level require:

Knowledge of: Requirements and uses of common contractual and related documents, such as notices to bidders, bid proposals, specifications, special provisions, general conditions and price schedules.

Ability to: Develop and draft specifications for a variety complex/technical procurement and standard contract actions; conduct the full range of studies; analyze and evaluate information, identify problems, and develop alternative solutions; clarify and explain provisions of existing laws, rules, regulations and policies accurately; exercise sound judgment.

PROCUREMENT AND CONTRACTS SUPPORT SPECIALIST IV

8B.653

Duties Summary:

Independently performs the full range and variety of work in procuring and establishing standards and specifications for commodities and services that involve the application of highly technical and complex principles, techniques, concepts and work processes within a centralized procurement and contracting program; may serve as a working supervisor over lower-level specialists; and performs other related duties as assigned.

Distinguishing Characteristics:

This class reflects a staff specialist occupied with independently performing highly technical and complex work assignments and processes by establishing standards and specifications for procurement and contracting of commodities and services.

A position of this type will include providing assistance on a regular basis with developing bidding procedures and contract methods for highly technical and complex projects; conducting studies on the impact of the program in relation to outside activities or its effect of external changes to the program; developing policy, legislative proposals, procedural and other manuals and conducting complex and/or the full range of purchasing and contracting assignments. Positions of this type will be responsible for problem-solving a wide range of complaints which could not be resolved by lower level specialists. In addition, such specialists may also be assigned to advise and assist lower-level specialists on unusual or highly technical or rarely used purchasing techniques or contracting methods and may assist in providing supervision.

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Positions perform work independently within general procedural and administrative guidelines. The supervisor is generally consulted only on complex and technical questions not covered by policy or precedents.

Examples of Duties:

Develops bidding procedures and contract methods for complex/technical common use commodities not previously managed by the program; studies the impact of the program on outside activities or the effect of changes of outside activities on the program (e.g. changes in commodity prices, business practices, shipping strikes, etc.); Prepares specification, terms and conditions to meet the minimum requirements of the user while assuring maximum competition; determines whether bids meet specification and legal requirements; reviews for sufficiency the justification and statutory compliance for sole source, emergency, exempt or restrictive purchases and recommends such action when appropriate; determines the type of specifications most appropriate for each purchasing requirement; problem-solves a wide range of complaints which could not be resolved at lower levels regarding procedures, policies, product quality, contract performance, late payments, unfair or biased actions, etc.; evaluate the impact of program activities on relevant statutes, rules and regulations and recommends solutions to problem areas; develops instructional sheets for bidders and purchasing policy guidelines and manuals for internal and external use; participates in analyzing and developing legislative proposals for the amendment of laws to meet changes in business practices and other conditions; conducts studies, analyzes and develops specifications for complex purchases including individual requests or for common-use commodities; in addition, performs work described at the lower level in relation to highly technical and complex work assignments.

Knowledge and Abilities Required:

In addition to knowledge and abilities at lower levels, positions at this level require:

Knowledge of: Thorough knowledge of State purchasing statutes, rules, policies and procedures.

Ability to: Develop and draft specifications for a variety of highly technical/complex procurement and standard contract actions; conduct highly complex studies; develop statewide purchasing and contracting policies, procedures and guidelines; develop legislative proposals; problem-solve a wide range of complaints or issues.

PROCUREMENT AND CONTRACTS SUPPORT SPECIALIST V

8B.654

Duties Summary:

Performs the most difficult work in procuring and establishing standards and specifications for the most complex, specialized and technical commodities and services; serves as a specialist with independent responsibility in problem solving the most difficult and technical issues with assignments of a very complex nature; may serve as a supervisor to lower-level specialists; performs other related duties as assigned.

Distinguishing Characteristics:

This class reflects an expert specialist performing the most complex, difficult, extensive and intensive procurement and contracts standards and specifications for a range of specialized and technical commodities and services for the Department of Education.

A position of this type will provide assistance to the administrator on a regular basis by handling assignments containing the most complex, specialized and technical work; conducting periodic audits of schools and offices in all areas of procurement and contracting; investigating complaints or controversies with recommendations carrying considerable weight for appropriate or corrective action; and resolving the most complex contract compliance of controversial or unprecedented issues. In addition, serves as the technical expert to administrators and bidders ensuring compliance with procurement codes, laws, rules and regulations, departmental policies and procedures. A position of this type may also assist in supervising or providing guidance and training to lower-level specialist on highly technical and complex assignments.

The position in this class works independently with considerable range of judgment and interpretation. The work includes responsibility for reviewing internal, departmental and statewide requirements affecting the centralized purchasing and contracting program and establishing guidelines and procedures or formulating new or amended policies for the use of staff as required in order to clarify requirements, improve operations or meet new legal or other requirements.

Examples of Duties:

Revises, clarifies, or develops purchasing policies, procedures, practices and guidelines for the use of staff as required; reviews outgoing correspondence drafted by staff; serves as technical resource to the Procurement Officer, administrators, and bidders to ensure compliance with Procurement Code, applicable state and federal administrative rules and regulations applicable to purchasing mandates and guidelines, other policies or procedures governing state agencies and organizations, and departmental policies or procedures; conducts periodic reviews of departmental procurement practices, including

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recommending appropriate revisions to procurement policies and procedures; conducts periodic audits of schools and offices in all areas of procurement and contracting to evaluate compliance with Procurement Code and departmental policies and procedures, including the preparation of reports and briefing of senior management officials on the findings and recommendations to correct procurement and contracting deficiencies; investigates complaints or controversies from department requisitioners and/or vendors or contractors; reports findings of fact and recommends appropriate or corrective action; resolves the most complex contract compliance issues (e.g. contract modifications, change orders, interpretations, time delays, cost overruns, transfer or assignments of contracts and other unforeseen circumstances); may train, guide or mentor lower level specialists. In addition, performs work described at the lower level in relation to most complex, specialized and technical work assignments.

Knowledge and Abilities Required:

In addition to knowledge and abilities required at lower levels, positions at this level require:

Knowledge of: The principles and practices of supervision.

Ability to: Develop and draft specifications for the most complex procurement and standard contract actions; conduct highly complex studies and provides sound recommendations; develop and revise statewide purchasing and contracting policies, procedures and guidelines; conduct audits and investigations; develop legislative proposals; analyze, evaluate and make sound decisions on complex problems; and for some positions, train and supervise others.

PROCUREMENT AND CONTRACTS SUPPORT SPECIALIST VI

8B.655

Duties Summary:

Plans, supervises and coordinates the overall day-to-day procurement and contracting activities within a centralized procurement and contracting program; and performs other related duties as required.

Distinguishing Characteristics:

This level reflects full-time supervisory responsibility in providing management and oversight of a large staff of specialists engaged in procuring and establishing standards and specifications for a wide variety of commodities and services.

A position of this type provides direct assistance to the administrator of the

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procurement and contracts program by administering a program that maintains an accurate flow and precise quality of work by subordinate staff; providing recommendations on improving managerial policies, practices, methods, procedures, and program objectives; providing technical advice and serving as the subject matter expert in procurement and contracts administration; planning, supervising, training, reviewing, and evaluating work assignments of subordinates; and coordinating and integrating activities with those of other branches/divisions within the Department of Education.

A position in this class works with considerable authority and latitude for independent judgment and interpretation. Work is performed under general administrative directions based upon current objectives. The work includes responsibility for overseeing and administering overall activities of a centralized procurement and contracts program.

Examples of Duties:

Reviews, analyzes, evaluates, develops and provides recommendations on improving managerial policies, practices, methods, procedures and/or organizational structure including program objectives, work assignments, functions and responsibilities, distribution, work methods and procedures; identifies space utilization, equipment utilization and records management to improve the efficiency and effectiveness in obtaining the Department of Education's goals and objectives; maintains flow and quality of work performed by subordinates to assure timely accomplishments of assigned workload; assesses status and progress of workload and readjusts priorities as necessary; obtains assistance from others as necessary to address operational problems not within immediate control; estimates project completion times; maintains records of work accomplishments and time expended, production capability and manpower needs; provides technical advice and expertise to subordinates and assists in their training, supervision and development; reviews drafts of specifications and special terms and conditions prepared by subordinates for overall technical adequacy; oversees the implementation of procurement and contracting guidelines, processes and procedures; recommends policy and/or procedural changes in section operation; develops and conducts procurement and contracts training program; conducts special management studies; conducts comprehensive analysis, evaluation, verification, information gathering and reporting of contractual matters and documents to insure compliance; establishes and maintains effective working relationships with other state agencies to encourage continuous management improvements; provide timely and effective consultative and technical management assistance when requested. In addition, may perform and supervise work described at the lower level in relation to the most complex and technical work assignments where recommendations or decisions are considered final.

Knowledge and Abilities Required:

In addition to knowledge and abilities required at lower levels, positions at this level require:

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Knowledge of: The principles and practices of administration; comprehensive knowledge of the overall operation of the entire procurement and contracts program.

Ability to: Plan, coordinate and supervise the activities of a group of procurement and contract support specialists engaged in procuring and establishing standards and specifications for a very wide variety of commodities and services including those of a complex and technical nature; assist in the development of goals and objectives of the centralized procurement and contracts program.

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This is a new class specification for the series Procurement and Contracts Support Specialist I, II, III, IV, V, & VI by the Department of Education Civil Service system.

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