PEA Job Description

1. Position Identification

<table>
<thead>
<tr>
<th>Position Number</th>
<th>992851, 993841, 994589, 994590, 994591</th>
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<tbody>
<tr>
<td>Position Title:</td>
<td>Purchasing Officer</td>
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<tr>
<td>Department:</td>
<td>Finance, Purchasing Services</td>
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<td>Reports to:</td>
<td>Director, Purchasing Services</td>
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<tr>
<td>Number of Direct/Indirect Reports</td>
<td>Direct 0, Indirect 3</td>
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<tr>
<td>Classification Level</td>
<td>SG 10</td>
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<tr>
<td>Last Updated</td>
<td>January 2017</td>
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2. Position Summary

Purchasing Services provides procurement, strategic sourcing, and supply management services to faculty and staff for the acquisition of goods and services through open, fair, and competitive processes.

The Purchasing Officer will lead the planning and delivery of procurement services to assigned departments, and is responsible for achieving best value in the acquisition of goods and services, while ensuring the integrity of the process and compliance with policy and applicable public sector procurement legislation.

Reporting to the Director, the Purchasing Officer is one of four procurement professionals providing end-to-end procurement services to clients in all Faculties and departments. As a professional member of the Purchasing Services team, the Purchasing Officer provides expert procurement advice to faculty and administrators and supports delivery of services and initiatives as required to meet service standards and expectations.

3. Key Responsibilities and Expectations (identify 3 to 5 key responsibilities and expectations for each)

<table>
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<tr>
<th>Key Responsibilities</th>
<th>Expectations:</th>
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<td>% of time</td>
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| 1. Purchase Requisition Review (25%) | a) Reviews, analyzes and interprets Purchase Requisitions. Determines complex goods and services requirements and supply options, and identifies future needs. Procsures jointly with other public agencies where appropriate. Refines standards and specifications in collaboration with clients.  
  b) Assists clients in determining needs, analyzes and clarifies client requirements. Writes and helps develop unbiased specifications. |
| 2. Sourcing (25%)     | a) Advises clients on procurement strategy options, plans and executes procurement process for highly technical acquisitions with complex evaluation criteria to meet client needs while ensuring compliance with University policies and applicable legislation. Performs market research and develops appropriate sourcing strategies to achieve best value for the University.  
  b) Establishes procurement timelines in collaboration with clients and stakeholders, and prepares solicitation documents (RFx) such as Requests for Proposals, Invitations to Tender, Requests |
for Quotations, Notices of Intent, Requests for Qualification, and other competition documents.

c) Mitigates procurement, financial, legal, and reputational risks to UVic through the entire solicitation process by ensuring fair, open, and transparent procurement practices are applied in compliance with policy and applicable legislation. Formulates strategic sourcing processes based on complexity, value, and critical requirements. Applies triple bottom line criteria (financial, environmental, and social) to procurements.

d) Coordinates and conducts supplier information meetings, site visits, and question and answer sessions during competitive process. Visits supplier and manufacturer facilities to assess production conditions and conduct in-progress inspections where appropriate. Responds to inquiries from potential respondents, clarifies technical inquiries, and issues RFx amendments. Receives RFx responses and ensures integrity of the procurement process. Assesses compliance with mandatory requirements, facilitates evaluation process, and develops award recommendations. Ensures the confidentiality and appropriate audit trail of the process and associated documents is maintained. Conducts debriefing sessions for unsuccessful respondents.

3. Supply Management Liaison (10%)

a) Plans, leads, and facilitates the procurement process in a multi-disciplinary environment. Problem solves with clients and stakeholders to optimize outcomes and resource utilization. Receives, records, reports and presents detailed and complex information orally and in writing to internal and external clients and stakeholders at levels appropriate to the audiences. Represents UVic’s interests and facilitates the resolution of supplier related disputes.

b) Attends meetings and committees to assist and provide expert advice on procurement. Supports acquisitions for major research projects, working with international organizations at all levels including senior market executives.

c) Participates in strategy development committees such as Research Services Operations Advisory Group. Provides expert procurement advice to researchers, faculty and administrators in the development of CFI/BCKDF, NSERC and other funding agency applications.

d) Coordinates specific mission critical procurement functions such as GST/PST tax updates, Solicitation Control, Supplier Registration, Signing Authority Updates, BC Bid Coordination, Commodity Code and HAZMAT coordination, Customs and Brokerage duty and tax, etc. when required.

e) Expedites orders and resolves supply management issues with Customs, Freight firms, Manufacturers and Suppliers.

4. Contract Formation and Management: (10%)

a) Drafts supply and services contracts and obtains legal review of non-standard clauses. Analyzes contracts for potential problems and opportunities. Negotiates contract terms and conditions to meet client needs and achieve intended procurement goals within prescribed guidelines and policies.

b) Monitors and reviews contract performance over the contract term. Ensures compliance of contracts and initiates appropriate action when breach of contract occurs.

c) Mediates contract disputes.
5. **Supplier Development and Market Awareness:** (10%)

a) Develops and assesses alternatives to predetermined negotiated outcomes. Researches market conditions and investigates information to develop negotiation strategies. Studies trends and stays informed on new developments in technology, products and services; prepares reports; investigates client and supplier complaints and obtains adjustments. Has general market knowledge of the quality and value of a wide range of commodities.

b) Sources, qualifies, and administers a competent and appropriate Supplier base. Assesses and pre-qualifies potential Suppliers based on suitability for requirements, value, quality, performance and financial stability. Educates Suppliers on UVic policies and procedures. Ensures all suppliers are treated fairly to promote positive long-term Supplier relationships.

c) Gathers and analyzes spend data, specifications, applications, contract terms and lead-time for commodities of major dollar value. Researches local, domestic, and international supply sources Stays current on supply chain management and economic trends, environmental issues, procurement laws, currency exchanges, and technology, developments.

d) Forecasts demand, develops purchasing strategies to reduce costs and ensure continuity of supply. Attends industry trade shows and product demonstrations.

6. **Value Analysis** (10%)

a) Coordinates evaluation committee member roles, advises on negotiation strategies, and ensures team is aware of the confidentiality and sensitive nature of discussions. Conducts negotiation strategy development meetings. Ensures accuracy of contractual terms and conditions. Leads negotiations to ensure best value is achieved in each acquisition of goods and services.

b) Works collaboratively with clients in establishing evaluation suitable criteria and weighting structure. Performs total cost of ownership, value analysis, and life cycle costing of responses to assist in the determination of most cost-effective strategies.

7. **Policy, Procedures, Operating Guidelines:** (10%)

a) Assists management in policy, procedure and operating guideline development and execution.

b) Ensures RFx documents are in compliance with Board of Governor approved policies and procedures, and public procurement standards.

c) Ensures compliance with public sector applicable legislation and Canadian contract law. Exercises discretionary judgement to obtain legal counsel on contractual matters. Abides by SCMA professional association code of ethics.

8. **Other Duties and Responsibilities** (5%)

a) Performs other duties as required.

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4. **Classification Factors:**

**Problem-Solving:**

Analyzes market conditions and procurement options, and develops sourcing strategies for major acquisitions. Writes high profile documents and reports that are technical and substantive in nature. Applies leading edge public procurement processes and supply management best practices. Engages in very complex joint procurement solutions with little margin for error.
Responsibility for Financial & Material resources:

The Purchasing Officer is responsible for analyzing Total Cost of Ownership, making or recommending acquisitions, and negotiating multimillion dollar contracts on behalf of the University. The position does not have budgetary responsibility, except as it pertains to budget checks on accounts for which transactions are being processed.

Responsibility for Human Resources:

Reporting to the Director, Purchasing Services, the Purchasing Officer provides daily guidance and direction to Purchasing Assistants, including assignment of tasks, reviewing throughput, monitoring performance, and mentoring.

Impact of Decisions and Actions:

Financial, legal, and reputational consequences of procurement errors can be substantial, including increased costs, lawsuits, and loss of UVic’s reputation with the business community and internal clients. Acquisitions, often in the millions of dollars, must be managed in a timely and effective manner; failures in the procurement process may have a significant negative impact on the operations of the University, affecting students, faculty, and staff.

The Purchasing Officer provides procurement and supply management advice to all levels of the University. Individuals, including senior executives, who receive the advice and recommendations rely on the integrity and accuracy of the information provided for decision making.

Independence:

The Purchasing Officer works independently under the general direction of the Director, Purchasing Services and provides expert procurement advice, informal training, and guidance to internal clients.

Makes recommendations and decisions to achieve best value in acquisitions, including multimillion dollar transactions, analyzing complex considerations and life cycle costing. These acquisitions could be in the millions of dollars per transaction.

Recommends and decides sourcing strategies, solicitation methods, suppliers to be invited, legality of process, posting conditions, make vs. buy, and other critical procurement aspects.

These decisions are made in accordance with University policies, applicable legislation, provincial government and funding agency directives, trade agreements, and other relevant regulations and authorities.

The Purchasing Officer sits on UVic and external joint procurement committees to provide public procurement expertise and guidance, and share sourcing information.

Participates in briefings, staff meetings and one-on-one’s, authors report for clients and management, reviews and archives acquisition documentation.

5. Summary of qualifications: What is the minimum amount of education, training and experience required to perform the duties of the position?

This position requires a Bachelor’s degree in a related discipline and at least three years of related work experience in a public sector environment, or have an equivalent combination of education, training and work experience. Professional accreditation (SCMA, APICS, or equivalent) and familiarity with public sector procurement law and practices are highly desirable.

In addition, the position requires the following abilities:
• Work and communicate effectively orally and in writing, with tact and diplomacy, with a variety of internal and external contacts

• Strong customer services focus

• Excellent interpersonal, communication, negotiation, conflict resolution, cross-cultural, and public relations skills

• Excellent team building skills with a demonstrated ability to work effectively with a team.

• Demonstrated administrative and organizational skills, with in-depth knowledge of procurement related computer systems and tools

The following are considered assets dependent on specific specialty requirements:

• Background in public sector capital construction procurement, including tenders and CCDC contracts

• Post-secondary joint procurement

• Strategic sourcing and supplier relationship management

• Scientific equipment purchasing

• IT Procurement

• Services Contract formation

• Customs & Brokerage

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<thead>
<tr>
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