PEA Job Description

1. Position Identification

<table>
<thead>
<tr>
<th>Position Number</th>
<th>NEW, 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 <em><strong>0</strong></em> Indirect <em><strong>3</strong></em></td>
</tr>
<tr>
<td>Classification Level</td>
<td>SG 10</td>
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<tr>
<td>Current Incumbent (if applicable)</td>
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2. Position Summary (brief summary of the position in relation to the work unit/department)

The Procurement Officer is a designated UVic Purchasing Agent authorized to commit the University to contractual obligations in the acquisition of products and/or services, construction, printing, and technology. The Procurement Officer is responsible to ensure the integrity of the acquisition process; maximize acquisition strategies, monitor and maintain supplier performance, create binding contractual documents and conduct negotiations while responding to both external/internal clients in a high pressure environment. The Purchasing Officer supports the Director, Purchasing Services when required and provides oversight to one Purchasing Assistant during operational purchasing initiatives. Provides advice and leadership to staff and assists management in staffing related matters, questions, problems and remediation.

The primary function and purpose of this position is to provide end-to-end procurement services to the University in accordance with policy, procedures, and operating guidelines. This includes all aspects of procurement including technical and professional advice with respect to requirements and specifications, acquisition of goods and services and disposal of surplus assets. The purpose of this position is to ensure that the University acquires goods and services in an open, fair, transparent and competitive manner; ensure that advice and leadership is provided to various stakeholders in the development of research programs; and achieve ‘best-value’ in all acquisitions.

The Purchasing Officer works with senior management and administrators within the University and Principal Investigators providing expert advice and counsel to researchers, faculty and administration in the procurement and process requirements. Purchasing Officers are, from time to time, required to audit departmental purchasing practices with respect to Purchasing Policy FM5105.

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

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<thead>
<tr>
<th>Key Responsibilities.</th>
<th>% of time</th>
<th>Expectations:</th>
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<tbody>
<tr>
<td>1. Purchase Requisition Review (25%)</td>
<td>a) Reviews, analyzes and interprets acquisition requests submitted on (Purchase Requisition or electronic WEBReq’s usually involving a complex level of goods and services. Evaluates requirements among competing interests. Determines requirements, supply alternatives (e.g. lease, purchase, rental, outsourcing, in-house) and identifies future needs. Networks and combines requirements with other public agencies where appropriate. Refines and translates standards</td>
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and specifications in conjunction with clients in preparation of the bid document.

b) Assists clients in determining needs, analyzes and clarifies client requirements. Writes, translates, and/or develops specifications while ensuring neutrality of bid specification documents.

2. Sourcing (25%)

a) Plans acquisitions (usually involving highly technical specifications and complex evaluation processes) to meet the client needs of the clients while ensuring compliance with the Purchasing and Signing Authority Policies. Ensures strategies to secure opportunities from new technology, commodities market, manufacturers, and suppliers in the marketplace and performs market and economic research to avoid threats of supply depletion.

b) Creates and monitors procurement timelines and prepares associated bid documents such as Requests for Proposal, Invitations to Tender, Requests for Quotations, Notices of Intent, Requests for Qualification etc.

c) Ensures the integrity of UVic is maintained through the entire solicitation process by understanding legal duties and obligations of the University and bidders with regard to legislation and various trade agreements. Formulates strategic bidding processes based on complexity, value, and critical requirements. Creates bid terms and conditions while ensuring the University is limited in legal liability, security, financial and political exposure.

d) Conducts and coordinates pre-bid meetings, site tours, question and answer sessions with Suppliers during bidding process on-site tours, and visits supplier and manufacturer facilities to conduct in-progress inspections. Responds to inquiries from Suppliers; clarifies technical inquiries and issues amendments to bids. Receives bids and ensures integrity of process. Systematically analyzes submissions based on evaluation criteria, disqualifies submissions not in compliance with bid terms and conditions. Ensures an appropriate audit trail of the process is defendable and maintained. Conducts debriefing sessions for unsuccessful bidders or proponent on evaluation information within confidentiality guidelines.

3. Supply Management Liaison (10%)

a) Plans, leads, and facilities the procurement process in a multi-disciplinary environment. Problem solves with all participants to optimize outcomes and utilize all available resources. Receives, records, and presents detailed and complex information orally and in writing to internal and external clients/groups at levels appropriate to the audiences. Acts as a mediator in representing UVic’s interests relating to Supplier issues.
b) Attends various meetings and committees to assist and provide input into decisions as to the sourcing requirements for solicitations. These include various research projects where Purchasing Services are working on a world level and at all organizational levels including market senior executives.

c) Participates in strategy development committees such as Research Services Operations Advisory Group. The Purchasing Officer is required to provide expert advice and counsel for researchers, faculty and administration for the development of their CFI/BCKDF and NSERC applications reflecting Fund Granting Agency policy and process requirements.

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 duty and tax, etc. when required.

e) Expedite orders and follow-up on supply management issues with Customs, Freight Firms, Manufacturers and Suppliers.

4. Contract Formation and Management:
   (10%)

   a) Prepares, writes, and reviews legal contracts and forwards non-standard contracts to the Director or legal counsel for review. Analyzes contracts for potential problems and opportunities. Negotiates contract terms and conditions within prescribed guidelines and client needs and commits the UVic interests to Suppliers up to the prescribed dollar limit as dictated by policy. Assures UVic interests are effectively represented through risk mitigation to ensure the resulting acquisition achieve its intended goals.

   b) Monitors and reviews contract obligations by both parties 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) Creates and evaluates alternatives to predetermined negotiated outcomes. Researches current market and investigates information for development of negotiated strategy. Studies trends and keeps advised on new developments in technology, products and services; prepares reports; investigates complaints and secures adjustments. Has general knowledge of the quality and value of a wide range of commodities.

   b) Administers, sources and qualifies a competent and appropriate Supplier base. Pre-qualifies and evaluates potential Suppliers to determine suitability for requirements, long-term viability and quality of references. Educates Suppliers on UVic policies and
c) Assembles and analyzes acquisition data, specifications, applications, contract terms and lead-time for commodities of major dollar value. Researches and maintains current commodity knowledge for sources of supply locally, domestically, and internationally, including economic trends, environmental issues, laws and currency exchanges, technology, areas of standardization and industry development for internal and external clients.

d) Forecasts cumulative commodity requirements, develops purchasing strategies to reduce costs and ensure continuity of supply. Attends industry trade shows and product demonstrations. Conducts and examines site tours of Supplier operations and performs in-progress inspections.

6. Value Analysis

(10%)

a) Coordinates roles of each member on evaluation team, educates teams on appropriate negotiation behavior, ensures team is aware of the confidentiality and sensitive nature of discussions. Conducts sessions for negotiation strategy with team concerning potential Suppliers. Ensures accurate documents are maintained for contractual terms and conditions. Leads negotiations to ensure a comprehensive and value-added package is secured for each acquisition.

b) Prepares and works with clients in establishing and determining an objective evaluation criterion and weighting structure. Performs value analysis and life cycle costing of bid submissions to assist in the determination of most cost-effective strategy.

7. Policy, Procedures, Operating Guidelines:

(10%)

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

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

c) Affirms compliance with public sector supply management legislation and Canadian contract law. Exercises discretionary judgement when a contract may require legal counsel.

8. Other Duties and Responsibilities

(5%)

a) Performs other duties as required.
### 4. Classification Factors:

#### (a) Independence of action, authority and decision making:

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

Decisions are made on a regular basis regarding best value acquisitions using comparative cost analysis involving complex considerations and life cycle costing. These acquisitions could be in the millions of dollars per transaction.

Decisions are often made for a department or faculty on method of acquisition, suppliers to be invited, legality of process, time for posting, location of posting, lease vs. rent vs. purchase, make vs. buy etc.

Often decisions are made by the staff member in the department that is assigned to the respective acquisition and the method of solicitation such as Request for Proposal, Invitation to Tender, Request for Quotation etc.

These decisions are made in accordance with Purchasing Policy FM5105, Signing Authority Policy FM5100, Strategic Alliance Policy FM5110, Furniture Policy, Travel Policy, Institutional Acquisition and Standardization of Information Technology Devices AD2515 and a variety of other relevant policies and procedural guidelines. This includes compliance with the New West Partnership Agreement (NWPTA), Agreement on Internal Trade (AIT) and various cross border agreements such as NAFTA, AIT, TILMA, etc.

The Purchasing Officer sits on UVic committees dealing with the fundamentally accepted public purchasing policies and procedures including joint committees with other local Purchasing Agents and the Greater Victoria Joint Purchasing Group which solicits tenders to realize volume discounts and share information regarding environmental and supplier issues.

Morning briefings, regular staff meetings and one-on-one’s, and work flowing from assigned commodities, including sourcing solicitations, and workflow management. Review of completed acquisitions and files.

#### (b) Accountability – scope and impact:

The consequence of an error is great, including the Organization’s integrity or credibility with the outside business community and internal customers. Acquisitions must be managed in a timely manner that often is in the million dollar range and can result in seriously affecting the operations of the University. For example, if a much needed and relied upon piece of technical equipment does not arrive in time for the commencement of a project, that project can be seriously impacted. The Purchasing Officer can effect the impact on students or operations.

Recommendations made by the incumbent that have not been thoroughly or appropriately analyzed could lead to increased cost to the University.

The Purchasing Officer provides procurement and supply management advice to all levels of the University, and the individuals who receive the information, advice and/or recommendations rely on the integrity and accuracy of the advice for senior level decision making.
(c) Supervision given and received:

The Purchasing Officers provide daily guidance and direction to the Purchasing clerks which includes assignment of tasks, reviewing throughput, monitoring performance, and mentoring.

d) Budget, Financial & Material resources:

The Purchasing Officers have responsibility for making or recommending acquisitions and negotiating contracts in the millions of dollars on behalf of the University. These positions do not have budgetary responsibility, except as it pertains to budget checks on accounts for which transactions are being processed. Must be able to complete comparative analysis (CCA) using net present value methodology.

(e) Problem-Solving

Developing high profile documents that are technical and substantive in nature are the norm to these positions within Purchasing Services. UVic Purchasing are using leading edge public procurement acquisition techniques that are unique to the marketplace. Engaging in joint-solution procurements is very complex and leaves little room or margin for error.

5. Summary of qualifications:

Must have a professional accreditation from an accredited professional organization, SCMA, APICS or equal, and at least three (3) years of directly and progressively related experience in a public sector environment; or

Bachelor’s degree in a related discipline supplemented by at least five (5) years of directly and progressively related experience in a public sector supply management environment.

Should be familiar with procurement law in the public sector obtained through formal training.

Supervisory experience of at least two (2) years would be desirable.

Must be comfortable with interacting with staff at all levels in a large organization and can exercise sound judgement and tact when providing service to a diverse group of clients.

Must have a strong customer service focus, mature, a self-starter, and a creative thinker. Takes ownership of projects and tasks and leads by example. Sets realistic goals, reliable, confident, and decisive. Must be flexible, politically astute, and professional. Good communicator and exhibits sound judgement.

Is capable of diffusing a Supplier and internal client dispute when dealing with a supply or contract fulfillment issue. Handling an inquiry or complaint for unnecessary delay in processing an acquisition on behalf of an internal client. Rationalizing the need for a public sourcing exercise versus a single or sole source.

A strong team player with good work ethic, professionally motivated with advanced communications skills. Must be computer proficient and familiar with electronic procurement systems and technology.

Membership in a professional organization such as SCMA or APICS. Attends and maintains skills through professional education, courses, seminars and trade shows, etc. Meets requirements to maintain a Professional Purchaser designation.