Part 1 – Identifying information (See instructions above):
Position Title Requested: Purchasing Agent
Date of Description: May 24, 2018
Supervisor Title: Risk Manager and Director, Business Operations
Position Number: 571710
Department: Procurement Services and Business Operations
Was the position previously exempted? Yes ___ No ___X___
Is the position currently filled by a Classified employee? Yes ___ No ___X___
Funding source* (check one): Grant ___ Gift ___ Auxiliary ___ Contract ___ General Fund ___
Is the position involved in the direct delivery of academic curriculum? YES ___ NO ___
If YES, explain how the position fulfills this role – be specific in your response.

*To qualify for exemption from the State Personnel System on the basis the funding source, no portion of the funding source may come from General Funds.

HR Use ONLY
Approved Position Title:
Date Reviewed: FLSA Exemption:
Exempt from Classified system? Date Exempted:
Basis for Exemption from Classified system:

Part 2 – Job Purpose:
The Purchasing Agent is responsible for the procurement of materials, supplies, equipment, and services for the University that will meet the needs of University administrative and academic departments and comply with regulatory guidelines, accepted purchasing principles, and University policies. The Purchasing Agent prepares detailed bid specifications for commodities and services requested by University departments and reviews vendor responses to solicitations. The Purchasing Agent also acts as a subject matter expert in regards to purchasing procedures that must be interpreted for departments and vendors. In order to accomplish this purpose the Purchasing Agent shall:
1. Manage and administer University purchase requests. Including intake of initial purchasing needs, obtaining appropriate pre-approvals, ensuring vendor information is up to date, and negotiation of applicable terms and conditions (e.g., Purchase Order terms and conditions, contracts). Approve purchase orders up to $100,000 and contracts up to $50,000.

2. Issue and administer competitive solicitations.

3. Use and implement Banner products, other products used by the department, and assist in process reengineering, including providing training on the procurement process.

Part 3 – Responsibilities: (Including percent of effort devoted to each and designating each responsibility as an Essential Function or not.)

Percentage of time estimated based on an annual average.

Due to the independence of operation and complexity of the duties, position must function at a professional level which requires experience with and application of concepts and principles of contract and purchasing administration.

1. **60% Manage and administer University purchase requests, intake initial purchasing need, obtain appropriate pre-approvals, ensure vendor information is up to date, negotiate applicable terms and conditions, and approve purchase orders up to $100,000 and contracts up to $50,000 - essential**

   - Serve as intake person for purchasing needs for specific departments, as assigned.
   - Interpret and analyze needs, specifications, data and circumstances, as well as, clarify purchasing party’s requirements.
   - Determine the appropriate procurement process applicable to the specific purchasing need.
   - Ensure appropriate pre-approvals are obtained (e.g., department head, center).
   - Obtain quotes from vendors, as necessary.
   - Ensure vendor information is up to date in Banner and assist with obtaining documents required to update vendor information (e.g., W-9), as necessary.
   - Review purchase requests, change order requests, contract requests, vendor agreements, modifications to existing terms and conditions/contracts for various factors including fiscal responsibility and urgency.
   - Coordinate review of funding source(s) to ensure purchase is allowable and if adequate funds are available.
   - Create electronic purchase requisition and upload supporting documents to Banner Document Management system.
   - Process approved purchase requisition documents into purchase commitment documents (up to $100,000 for encumbrance documents and up to $50,000 for contracts).
   - Using delegated authority, negotiate or clarify terms, price, delivery and specifications.
   - Resolve internal customer and vendor complaints, claims, and disputes.
   - Provide professional purchasing expertise, counsel and assistance to University faculty, staff and students.
• Prepare and administer contracts. Develop a strong understanding of the substance of contracts being processed and summarize business risks associated with the contracts.
• Identify best practices for procurement functions by reviewing and analyzing the practices of other State Agencies and/or Institutions of Higher Education.
• Attend statewide trainings and meetings (e.g., PAC meeting, CCIT meeting) as a representative of Mines Procurement Services. Attend other external trainings and meetings and incorporate knowledge from such trainings and meetings into the current Mines procurement process.
• Develop effective working relationships with internal customers and fund approvers.
• Understand and comply with internal controls related to the procurement process.
• Analyze campus spending and recommend areas that should be addressed to reduce cost, increase efficiencies and/or provide better equipment and services to campus.
• Identify when a procurement may require a waiver of university policies/rules and make a recommendation to Risk Manager and Director, Business Operations.

2. **30% Issue and administer competitive solicitations – essential**
• Formulate, solicit, analyze and award competitive solicitations, including but not limited to, Request for Proposals (RFPs), Invitation for Bids (IFBs), Notice of Proposed Sole Sources and Documented Quotes (DQs).
• Provide guidance and detailed assistance drafting specifications and requirements for solicitation documents.
• Compose and submit applicable RFP, IFB, Sole Source or DQ documentation on the approved solicitation system.
• Evaluate and compare vendor responses, determine the appropriate vendor to be awarded and resolve vendor protests, should any arise.
• Help coordinate and lead the RFP committee process and work directly with the RFP committee chair to facilitate committee review and address committee and vendor questions during the RFP process.
• Review best practices for solicitation processes and modify and keep all solicitation templates up to date.

3. **10% Use and implement Banner products, other products used by the department, and participate in process reengineering, including providing training on the procurement process – essential**
• Participate in and contribute to procurement process reengineering, including but not limited to, the implementation of BDMS and Workflow.
• Understand, utilize and provide assistance to campus on the contracts database, Contract and Research System (CRS).
• Fundamentally understand, recommend, and implement process changes that will positively impact the procurement process.
• Develop and provide training to university faculty, staff and students, either in a formal training session or individually to help facilitate the understanding of Mines procurement process and implementing new Banner products. Training topics shall include, but not limited to, State requirements, procurement rules, financial policies, electronic requisition processing, and changes to Banner products.

• Develop processes to assist university faculty, staff and students through the workflow procedures to be implemented around the purchase request and PO process.

• Create and maintain a calendar and schedule for ongoing trainings to be delivered to university faculty, staff and students.

4. **Other duties and responsibilities that might arise from time to time. Non-essential - indeterminate**

**Part 4 – Qualifications:**

**Required:**

- Baccalaureate degree
- Basic experience with the procurement process
- Fluency in Microsoft Office Suite
- Excellent communication skills (oral and written)

**Desired:**

- Experience negotiating terms and conditions/contracts
- Progressive and professional level experience in procurement
- Experience working in an institution of Higher Education
- Demonstrated familiarity with Banner or other Oracle-based financial system
- Experience developing and working with database reporting and ability to learn software systems
- Analytical thinking, research skills, and problem solving skills
- Excellent training skills
- Advanced degree in business, accounting, finance, law, paralegal or other related field
- Progress toward such certification (e.g., CPPB)
- Demonstrated:
  - ability to navigate complex procurements
  - success with the duties listed in the job description
  - knowledge and comprehensive understanding of theories, principles, and best practices of purchasing
  - knowledge and comprehensive understanding of theories, principles, and best practices of strategic procurement
  - ability to adapt to change
  - critical thinking, independent research, problem solving and negotiation skills
Administrative / Research Faculty Job Description and Exemption Request Form

- customer service, interpersonal and relationship building skills
- attention to detail and accuracy
- time and project management skills

Part 5 – Decision Scope:

Manage and administer University purchase requests:

- Use discretion to determine the priority order in which to process procurement requests.
- Through evaluation of purchase and contract requests, determine the most effective method of procurement that will provide the requested item(s), while maximizing competition and complying with relevant laws and procurement rules.
- Exercise discretion and judgment to determine appropriate procurement method should be used where guidelines do not dictate which is to be used.
- Through evaluation of purchase and contract requests, determine appropriate account codes to be used when there are is more than one account code that fits the description of the procurement.
- Determine if financial approvals are appropriate based on the source of funds being utilized for the procurement.
- Resolve negotiations by finding mutually acceptable solutions and building consensus through give and take. Know when to escalate complex negotiations to the Contracts Administrator or the Risk Manager and Director, Business Operations.
- Evaluate terms and conditions and requested modifications in order to identify legal and business risks that must be identified to Risk Management, Legal, and/or applicable department.
- Determine when significant risk or liability exists that would warrant the issuance of a university contract vs. issuing a purchase order.
- Determine if vendors are being used regularly by the university faculty, staff and students and identify if those procurements warrant a negotiated or bid contract.
- If an issue with vendor performance is identified, evaluate and recommend to the Risk Manager and Director, Business Operations when a contract should be cancelled or if punitive action should be taken.

Issue and administer competitive solicitations:

- Evaluate and determine the intent and motive of applicable purchaser to support their requisition for products that have been posted for competitive solicitation.
- Determine specifications to ensure a competitive bid that meets the end users minimum requirements.
- Evaluate and determine whether vendor proposals, bids and quotes qualify as responsive or non-responsive.
- Evaluate proposals for RFPs, IFBs and DQs and determine which vendor to award the purchase.
- Analyze product data provided in vendor responses to determine if product substitution would benefit the user in either cost or performance.
• Evaluate sole source requests and provide recommendation as to whether the procurement should be considered a sole source or not.

Use and implement Banner products, other products used by the department, and participate in process reengineering, including providing training on the procurement process:

• Determine action items required to implement new system products including identifying tasks, testing and documenting. This is key for implementing new products such as BDMS and Workflow.
• Independently analyze current processes and identify and suggest to the procurement team areas where efficiency can be improved.
• Determine content and design for training materials.

Determine when an end user requires additional training in order to effectively and efficiently manage their own procurement requests.

Part 6 – Communications:
This position will be required to effectively communicate with campus departments when providing guidance and training for procurements and system implementations. They must also be able to provide both written and oral reports to management when providing analysis and recommendations provided for various decisions. Additionally, clear communication of Mines’ position on contested terms and conditions will be required during negotiations of terms and conditions and contracts. In addition, this position requires professional and effective communication skills when dealing with vendors to communicate University specifications and requirements. It is important that this position possess good negotiation skills while working on contested PO terms and conditions or contract provisions and potential vendor protests. This position will also be required to develop training materials and deliver trainings to university faculty, staff and students in a clear and concise manner.

Part 7 – Work Environment and Physical Demands
Work performed in a typical office environment. Some travel may be required. Mostly sedentary. May involve reaching, fingering, talking, hearing, and near acuity. Involves comparing, copying, computing, compiling, analyzing, coordinating, synthesizing, negotiating, communicating, instructing and interpersonal skills.

Part 8 – Approving Signatures: [See instructions]

______________________________________  __Natalie Vega ______________  ______________
Direct Supervisor/Manager Signature       Typed/Printed Name          Date

______________________________________  __Natalie Vega ______________  ______________
Department Director or Manager Signature  Typed/Printed Name          Date
Additional Signature (if dean or VP requires)  Typed/Printed Name  Date

Checklist:

☐ Are all sections completed?
☐ Are essential functions identified?
☐ Is form signed?
☐ Organization chart attached?

Incomplete forms or forms missing signatures or an attached organization chart will be returned to the originating department; only completed forms will be processed.

When submitting this form for consideration, do not include the instruction pages in the final submission.