

DUTY STATEMENT

GS 907T (REV. 03/05)

SHADED AREA TO REFLECT RECLASS POSITION NUMBER ONLY**INSTRUCTIONS:** Refer to the Essential Functions Duty Statement Manual for instructions on how to complete the Duty Statement.RPA **11547-PROC**

EFFECTIVE DATE:

DGS OFFICE OR CLIENT AGENCY Procurement	POSITION NUMBER (Agency - Unit - Class - Serial)
UNIT NAME AND CITY LOCATED One-Time Acquisitions - West Sacramento -	CLASS TITLE Associate Materials Analyst
WORKING DAYS AND WORKING HOURS Monday through Friday 8:00 a.m. to 5:00 p.m.	SPECIFIC LOCATION ASSIGNED TO 707 3 rd Street, West Sacramento, CA 95605
PROPOSED INCUMBENT (If known) VACANT	CURRENT POSITION NUMBER (Agency - Unit - Class - Serial) 306-504-4901-064

YOU ARE A VALUED MEMBER OF THE DEPARTMENT'S TEAM. YOU ARE EXPECTED TO WORK COOPERATIVELY WITH TEAM MEMBERS AND OTHERS TO ENABLE THE DEPARTMENT TO PROVIDE THE HIGHEST LEVEL OF SERVICE POSSIBLE. YOUR CREATIVITY AND PRODUCTIVITY ARE ENCOURAGED. YOUR EFFORTS TO TREAT OTHERS FAIRLY, HONESTLY AND WITH RESPECT ARE IMPORTANT TO EVERYONE WHO WORKS WITH YOU.

BRIEFLY (1 or 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of the Senior Electronic Data Processing (EDP) Acquisition Supervisor, One-Time Acquisitions Unit, the incumbent is responsible for purchasing commodities, goods, and services for State agencies.

% of time performing duties | Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. (Use additional sheet if necessary)

25%	<p>This position is designated under the Conflict of Interest Code. The position is responsible for making, or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete form 700 within 30 days of appointment. Failure to comply with the Conflict of Interest Code requirements may void the appointment.</p> <p>The Department of General Services' (DGS) Core Values and Employee Expectations are key to the success of the Department's Mission. That mission is to "Deliver results by providing timely, cost-effective services and products that support our customers." DGS employees are to adhere to the Core Values and Employee Expectations, and to perform their duties in a way that exhibits and promotes those values and expectations.</p> <p>All work is to be accomplished in accordance with the State Administrative Manual, State Contracting Manual, established Government Codes and Regulations, Senate Bills, and legislation.</p> <p>ESSENTIAL FUNCTIONS</p> <p>In order to meet the needs of State agencies in the procurement of goods and services, coordinate and control all aspects of complex acquisitions of goods and services and process complex commodity purchases utilizing negotiations and the formal competitive bid process, the incumbent will:</p> <p><u>Needs Assessment</u></p> <ul style="list-style-type: none"> Develop solicitations, procurement plans, administrative requirements, award evaluation methodologies and analysis, contracts, and compliance management, including post-award contract modifications, through extensive use of the BidSync, Fi\$Cal, and other the appropriate software programs.
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SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE

SUPERVISOR'S NAME (Print) Haydee Giusti	SUPERVISOR'S SIGNATURE	DATE
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EMPLOYEE'S STATEMENT: I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THE POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT

The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise balance the workload.

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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RPA 11547 **PROC**

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25%	<ul style="list-style-type: none"> • Verify the state's needs are met by extending efforts to secure suppliers' competition and compliance to the solicitation and if needed, develop alternative selection evaluation models unique to individual acquisitions. <p><u>Invitation For Bid and Contract Negotiations</u></p> <ul style="list-style-type: none"> • Analyze agency requests for requirements specific to the commodity, quantity, specifications, delivery terms, estimated price, suppliers, etc. in order to develop appropriate administrative requirements, technical specifications, testing requirements, performance bond requirements, insurance requirements and any other procurement tools needed. • Research industry standards and legislative requirements and policies and procedures governing governmental procurement to assure solicitation/contract compliance with industry standards, current legislative requirements and all applicable procurement policies and guidelines, by utilizing internet resources, and by discussions with suppliers. • Advise state departments on the applicable procurement processes and applicable government codes and regulations including steps to resolve vendor disputes by participating in meetings with state agency contracting officials, buyers, or working-level contacts, etc., on-site at PD and occasionally off-site at the requesting state department's location • Develop quality, effective solicitation, contract and support documents by the extensive use of BidSync, Fi\$Cal, appropriate software programs, and meeting with Subject Matter Experts and management.
20%	<p><u>Contract Award</u></p> <ul style="list-style-type: none"> • Review bid submittals based on requirements of the solicitation including: reviewing bid prices, specification compliance, delivery terms, brand and models offered, recycle content, TACPA etc., utilizing the appropriate software program spreadsheets to determine the proposed awardee (or awardees).
20%	<p><u>Contract Management</u></p> <ul style="list-style-type: none"> • Evaluate bids and investigate complaints by initiating telephone inquiries, e-mail communications, and/or site visits to negotiate settlements between suppliers and State agencies (utilizing knowledge of state purchasing procedures and policies and the Office of Legal Services' (OLS) determinations) to resolve agency, bidder, or awardee questions and disputes. • Advise suppliers on the purpose for specific requirements and the various solicitation steps including submission of compliant bids, evaluation criteria, award methods, and protest procedures. • Participate in or conduct small project teams in the evaluation of complex bids peer review and evaluation sessions, testing or demonstration of bidder's equipment, notification of award, and protest hearings by meeting with agency personnel such as contracting officials, buyers, working level contracts, or suppliers, on-site and occasionally off-site at the requesting state department's location. • Monitor contract compliance according to terms and conditions by reviewing performance bonds, protocols, product inspections, and other terms stated in the contract. • Schedule and conduct supplier facility site visits statewide, to confirm specification requirements and answer supplier questions regarding specific contract requirements. • Prepare follow-up correspondence to suppliers and agency representatives that include goal attainment letters, cure notices, stop work orders, legal responses, legislative responses, contractor compliance letters, sample requests, or contract amendments. • Design new analytical tools, as needed, to ensure the State's best interest and contract terms are achieved.

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5%	<p><u>Post-Award Process</u></p> <ul style="list-style-type: none"> • Facilitate resolution by reevaluating entire project for completeness, accuracy, and compliance to state laws, regulations, policies and procedures. • Participate in protest meetings to provide complete history of contract process. • Research and prepare responses to protest including letters, memorandums, reports, etc. for Dispute Resolution Unit. • Prepare a detailed report fully analyzing all of the above pertinent contract information to present to Management. This report may include all facts concerning vendor's bids that have been rejected and/or detailed reports, including chronology of events, for the Victim Compensation & Government Claims Board in cases involving bid protests.
5%	<p>MARGINAL FUNCTIONS</p> <p>Maintain a high level of expertise on assigned commodities through professional organizations, personal research, including visiting manufacturing facilities, suppliers, and State agencies. Attend trade shows and seminars and evaluate market reports to keep current with commodity market conditions. Represent the Procurement Division at conferences sponsored by either private enterprise or governmental entities.</p> <p>KNOWLEDGE AND ABILITIES</p> <p><i>Knowledge of:</i> Materials management; inventory management; data processing systems, software and their applications to materials data systems; term contract formulation; negotiation and administration; transportation and distribution management; procurement engineering; property reutilization and recycling; acquisition analysis; energy conservation and environmental impact analysis; cost study techniques including lease-versus-purchase analysis and life cycle costing; logistics; statistical analysis and forecasting techniques; principles and practices of public and business administration; organization and management; methodology for conducting analytical studies; policy formulation; technical report writing.</p> <p><i>Ability to:</i> Analyze situations and problems accurately and take effective action; establish and maintain effective working relations with those contacted in the course of the work; plan, organize and lead analytical studies and audits to enhance State utilization of materials; monitor data systems; formulate comprehensive recommendations which synthesize elements of acquisition, warehousing, cost effectiveness, inventory and traffic management, specification development, quality control, space utilization, personnel management and EDP utilization; communicate effectively; successfully negotiate agreements to increase the effectiveness of agencies' materials management systems; interpret and apply laws, rules and policies.</p> <p>DESIREABLE QUALIFICATIONS</p> <ul style="list-style-type: none"> • Knowledge of Public Contract Code, Government Code, Business and Professions Code, State Administrative Manual, State Information Management Manual, and Uniform Commercial Code • Familiarity with state procurement processes, including Feasibility Study Report requirements, and State protest process • Proficiency with personal computer and the appropriate software programs, the internet, and data conversion techniques • Familiarity with IT and Telecom trends • Knowledge of Western States Contracting Alliance (WSCA), National Association of State Purchasing Officials (NASPO), California Professional Purchasing Officials (CAPPO), and National Contract Management Association (NCMA) desired but not required.

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	<ul style="list-style-type: none"> • Ability to write comprehensively, communicate with all levels of management, including executive and peers, attorneys, and external customers. • Familiarity with root-cause analysis <p>SPECIAL PERSONAL CHARACTERISTICS</p> <ul style="list-style-type: none"> • Dependable: responsible; positive attitude • Ability to lead and participate in teams • Ability to provide objective overview of situations • Willingness to accept challenges, handle multiple projects simultaneously • Ability to effectively handle stress and deadlines <p>WORK ENVIRONMENT, PHYSICAL OR MENTAL ABILITIES</p> <ul style="list-style-type: none"> • Professional office environment, appropriate business attire required • Daily use of phone, fax, copiers and general office and communication equipment • Occasional use of cell phone, pagers, and laptop computer. • Frequent use of a computer and related software applications and the Internet at a workstation • Sitting in a seated position for extended periods of time • Travel throughout the State to survey State agencies and suppliers • Frequent off-site meetings within Sacramento and occasional out-of-town within California meetings that may require the use of various transportation modes, i.e. airplane, taxi, car, etc. • Use of a hand cart to transport documents and/or equipment up to 15-20 lbs., i.e. laptop computer, reference manuals, solicitation documents, etc.

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RPA-

11547-PD

EFFECTIVE DATE:

DGS OFFICE OR CLIENT AGENCY Procurement	POSITION NUMBER (Agency - Unit - Class - Serial) 306-504-5157-xxx
UNIT NAME AND CITY LOCATED One-Time Acquisitions (OTA) - West Sacramento	CLASS TITLE Staff Services Analyst
WORKING DAYS AND WORKING HOURS Monday through Friday 8 a.m. to 5 p.m.	SPECIFIC LOCATION ASSIGNED TO 707 3 rd Street, West Sacramento, CA 95605
PROPOSED INCUMBENT (If known)	CURRENT POSITION NUMBER (Agency - Unit - Class - Serial) 306-504-4901-064

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BRIEFLY (1 or 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the supervision of the Senior Electronic Data Processing (EDP) Acquisition Supervisor, One-Time Acquisitions Unit, the incumbent is expected to provide administrative support to all procurement activities, and responsible for purchasing non-IT goods and IT-goods and services on behalf of the state agencies.

% of time performing duties | Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. (Use additional sheet if necessary)

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The Department of General Services' (DGS) Core Values and Employee Expectations are key to the success of the Department's Mission. That mission is to "Deliver results by providing timely, cost-effective services and products that support our customers." DGS employees are to adhere to the Core Values and Employee Expectations, and to perform their duties in a way that exhibits and promotes those values and expectations.

ESSENTIAL FUNCTIONS

In order to meet the needs of State agencies in the procurement of goods and services, coordinate and control all aspects of acquisitions of goods and services and process commodity and IT goods and services purchases utilizing negotiations and the formal competitive bid process in accordance with the State Administrative Manual, State Contracting Manual, established Government Codes and Regulations, Senate Bills, and legislation.

Administrative Support

35%

- Provide administrative support to procurement activities. Prepare Monthly Reports to include: Procurement Log, Score Card, and IT STD 213 Reports.
- Schedule and provide Bid Readings.
- Records Management and filing management.

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20%	<p><u>Invitation For Bid and Contract Negotiations</u></p> <ul style="list-style-type: none"> • Analyze agency requests utilizing root cause analysis for special requirements specific to the commodity, quantity, specifications, delivery terms, estimated price, suppliers, etc. in order to develop an appropriate specification. • Research industry standards and legislative requirements and policies and procedures governing governmental procurement to assure solicitation/contract compliance with industry standards and current legislative requirements by utilizing a personal computer and internet resources and by discussions with suppliers either on the telephone or by meeting on-site at PD and occasionally off-site. • Develop terms and conditions reflecting agency canvassing, analysis of vendor usage reports, Procurement Division computer reports and historical data to assure solicitations/contracts accurately reflect state usage requirements utilizing a computer, PIN, BidSync, FI\$Cal, and other related software applications. • Learn the key components of solicitation development which may require extensive use of PIN and the appropriate software programs, to develop solicitation, contract, and support documents.
15%	<p><u>Needs Assessment</u></p> <ul style="list-style-type: none"> • Receive individual requests from State agencies in both hard copy and electronic format for a wide variety of goods and services to be used as the foundation for solicitation/contract development. • Develop solicitations, procurement plans, award evaluation data, contracts, and compliance management including post-award contract modifications through extensive use of the PIN, BidSync and the appropriate software programs. • Survey and perform cost analysis on multi-state alliances, e.g., Western States Contracting Alliance (WSCA), National Association of State Purchasing Officials (NASPO), California Professional Purchasing Officials (CAPPO), and National Contract Management Association (NCMA) to determine best value. • Validate that the state's needs are met by extending efforts to secure suppliers' competition and compliance to the solicitation and if needed, develop alternative selection evaluation models unique to individual acquisitions.
10%	<p><u>Contract Award</u></p> <ul style="list-style-type: none"> • Evaluate bid submittals based on requirements of the solicitation including: reviewing bid prices, specification compliance, delivery terms, brand and models offered, recycle content, etc., utilizing the appropriate software program spreadsheets using a computer and extensive keyboard entry to determine the proposed awardee (or awardees). • Conduct Costing analysis and apply preference programs such as Small Business/ Disabled Veterans Business Enterprise (SB/DVBE), and Target Area Contract Preference Act (TACPA in order to determine a bidder's compliance with the solicitation requirements and assure award is in compliance with all requirements.
10%	<p><u>Contract Management</u></p> <ul style="list-style-type: none"> • Investigate complaints by initiating telephone inquiries, e-mail communications, and/or site visits to negotiate settlements between suppliers and State agencies utilizing knowledge of state purchasing procedures and policies to resolve agency, bidder, or awardee questions and disputes. • Develop communications that aid participating entities in effectively utilizing contract features, ensuring timely delivery and that contract requirements are met. • Participate in or conduct small project teams in the evaluation of moderately complex bids peer review and evaluation sessions, testing or demonstration of bidder's equipment, notification of

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	<p>award, and protest hearings by meeting with agency personnel such as contracting officials, buyers, working level contracts, or suppliers, on-site and occasionally off-site at the requesting state department's location.</p> <ul style="list-style-type: none"> • Monitor contract compliance according to terms and conditions by reviewing reports on usage guidelines, protocols, and product inspections. • Schedule and conduct supplier facility site visits, statewide to confirm specification requirements and answer supplier questions regarding the specific contract requirements. • Prepare follow-up correspondence to suppliers and agency representatives that include goal attainment letters, stop work orders, legal responses, legislative responses, contractor compliance letters, sample requests, or contract amendments. • Assist in designing new analytical tools utilizing the appropriate software programs which may be migrated to another platform.
5%	<p>Post-Award Process</p> <ul style="list-style-type: none"> • Notify Dispute Resolution Unit of any protested award by providing a copy of the supplier protest and supporting documentation. Types of disputes include protests and complaints against solicitation; protests against proposed awards; and contract disputes and related issues. • Facilitate resolution by reevaluating entire project for completeness, accuracy, and compliance to state laws, regulations, policies and procedures. • Participate in protest meetings to provide complete history of contract process. • Research and prepare responses to protest including letters, memorandums, reports, etc. for Dispute Resolution Unit. • Prepare a detailed report fully analyzing all of the above pertinent contract information to present to Management. This report may include all facts concerning vendor's bids that have been rejected and/or detailed reports, including chronology of events, for the Victim Compensation & Government Claims Board in cases involving bid protests.
5%	<p>MARGINAL FUNCTIONS</p> <p>With instruction, will develop expertise on assigned commodities through professional organizations, personal research, including visiting manufacturing facilities, suppliers, and State agencies. Attend trade shows and seminars and evaluate market reports to keep current with commodity market conditions. May represent the Procurement Division at conferences sponsored by either private enterprise or governmental entities.</p> <p>KNOWLEDGE AND ABILITIES</p> <p>Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; and governmental functions and organization.</p> <p>Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work.</p> <p>DESIREABLE QUALIFICATIONS</p> <ul style="list-style-type: none"> • Knowledge of Public Contract Code, Government Code, Business and Professions Code, State Administrative Manual, State Information Management Manual, and Uniform Commercial Code

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