Position Description
Purchasing Agent Objective
January 2012

Position Summary

This is a professional level position which acts as the liaison between the University of Wisconsin-Superior, the Department of Administration, the University of Wisconsin System, the bank purchasing card provider and the vendor community. This position reports to and works with the Controller/Director of Business Services. Responsibilities include, but are not limited to: provide for all aspects of the procurement process according to established laws, procedures and policies under delegated purchasing authority; review departmental purchase requests for compliance with State, UW System and UW-Superior policy; process sealed bids; manage campus purchasing card program; administer contracts developed by Department of Administration (DOA), UW System and UW-Superior. Assist Controller/Director of Business Services in the development of new contracts and renewal of existing contracts which may include the following: audit and analyze purchases, consult with users of contracts, prepare generic specifications, coordinate bid procedures, evaluate competitive bids and requests for proposal and recommend and/or award bids and contracts. The incumbent must be able to maintain full purchasing delegation from UW System.

Goals and Activities

25% GOAL 1: PROVIDE GENERAL PURCHASING SUPPORT TO CAMPUS

1.1 Interpret purchasing policies and procedures for faculty, staff and students and assist them in the procurement process.
1.2 Attend monthly UW System Purchasing teleconference. Attend bi-annual UW System meetings at various campuses. Participate in the UW System Purchasing ListServe and respond to inquiries/directives.
1.3 Review/distribute DOA, UW-System, and UW-Madison contract updates to appropriate person(s). Respond to DOA requests for information.
1.4 Submit monthly Minority Report to DOA.
1.5 Maintain vendor relationships and respond to inquiries.

25% GOAL 2: REVIEW PURCHASE REQUISITIONS & PROCESS PURCHASE ORDERS

2.1 Receive and review all departmental purchase requisitions for compliance with State, System and UW-Superior policy. Verify applicable contracts are utilized and pricing is correct. Assign account code and NIGP code. Ensure Certificate of Insurance is on file when necessary. Complete purchase orders, field orders, or purchasing card transactions. Process change orders as needed.
2.2 Administer DOA, UW-System, UW-Madison, and UW-Superior contracts for University purchases to assure appropriate vendors and pricing are utilized.
2.3 Maintain vendor information in Shared Financial System (SFS). Maintain W-9 information in SFS for 1099 reportable services.
2.4 Review bid waiver requests and determine if they are justified. Receive and review requests for emergency purchases and, if appropriate, issue emergency purchase order number. In emergency situations where the estimated cost of an emergency procurement exceeds $25,000, a justification letter is submitted to DOA to obtain a waiver of the official sealed bid process from the governor, or from the governor's designee.
2.5 Periodically review PO Adjusted Balance Report and open purchase orders. Close zero balance orders; contact departments regarding low-balance orders and close them if possible.

20% GOAL 3: COORDINATE PURCHASING CARD PROGRAM

3.1 Receive and review purchasing card applications. Develop and maintain hierarchy list of departmental accounts. Administer program utilizing the U.S. Bank Access Online system.
3.2 Distribute new cards, cancel cards, and make changes to cardholder’s accounts as needed.
3.3 Train new card holders in proper purchasing card use. Assist cardholders with any purchasing card questions. Maintain online training materials.
3.4 Review biweekly report in Access Online of all card activity. Review all transactions and request documentation for a sample of transactions.
3.5 Maintain files for each cardholder.
3.6 Maintain Outlook Purchasing Card User/Manager list for email updates.

15% GOAL 4: MANAGE QUOTES, SIMPLIFIED BIDS, SEALED BIDS AND RFPS

4.1 Solicit quotes when required, administer simplified bid, sealed bid and request for proposal processes. Develop generic specifications, conduct and award official sealed bids.
4.2 For services: Assure appropriate union notification, cost-benefit analysis, procurement plan, and DOA requirements are completed when necessary.
4.3 Post official bids to VendorNet. Respond to vendor inquires regarding bid specifications, timelines, acceptable substitutes, basis for awards, etc…
4.4 Open bids received, tabulate prices and prepare bid abstract. Notify bidders of intent to award and when necessary, resolve any protests to award. Close bid on VendorNet and issue purchase order.

5% GOAL 5: ADMINISTER ONLINE SUPPLY ORDERING WITH MDS

5.1 Serve as campus contact for online supply ordering with MDS.
5.2 Process MDS account applications, maintain and update a master file of campus users.
5.3 Provide on campus assistance as needed.

5% GOAL 6: MAINTAIN PURCHASING WEBSITE

6.1 Maintain and upgrade web pages for the Purchasing office. Attend training sessions on web page development as required. Maintain professionalism of Purchasing office by keeping web page as up to date and intuitive as possible.
6.2 Develop and update online and fill-in forms for posting on web.

5% GOAL 7: OTHER DUTIES AS REQUESTED

7.1 Work with Budget and Policy Analyst to complete annual capital inventory report.
7.2 Supervise and train student workers, provide tasks, and approve time reporting.
7.3 Delegate printing authority to Print Manager according to guidelines as established by DOA. Review print orders for compliance purchasing regulations.
7.4 Pursue professional development through participation at conferences, workshops, professional organizations, etc
KNOWLEDGE, SKILLS AND ABILITIES

- Knowledge of State and University purchasing rules, regulations and procedures.
- Knowledge of principles and practices of professional purchasing, including value analysis and techniques in writing specifications and contracts.
- Knowledge of accounting and auditing principles.
- Knowledge of the procurement of products and services.
- Knowledge of State purchasing card program.
- Experience managing and administering procurement contracts.
- Effective negotiation skills.
- Experience with software programs including Microsoft Word, Excel and electronic purchasing systems. Experience with PeopleSoft Shared Financial System is a plus. Experience maintaining a website desired.
- Ability to maintain a professional and service-oriented relationship with customers and coworkers. Ability to be creative, flexible, self-motivated and quality oriented.
- Excellent written and oral communication skills.
- Strong organizational skills with the ability to handle multiple tasks.

SPECIAL REQUIREMENTS

- Must be able to acquire and maintain full purchasing delegation from DOA and UW System.
- Must take all DOA courses required for full delegation.