



**GENERAL SERVICES AGENCY  
COUNTY OF TULARE  
AGENDA ITEM**

**BOARD OF SUPERVISORS**

KUYLER CROCKER  
District One  
PETE VANDER POEL  
District Two  
AMY SHUKLIAN  
District Three  
J. STEVEN WORTHLEY  
District Four  
MIKE ENNIS  
District Five

**AGENDA DATE:** March 6, 2018 **REVISED**

Public Hearing Required	Yes	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>
Scheduled Public Hearing w/Clerk	Yes	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>
Published Notice Required	Yes	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>
Advertised Published Notice	Yes	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>
Meet & Confer Required	Yes	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>
Electronic file(s) has been sent	Yes	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>
Budget Transfer (Aud 308) attached	Yes	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>
Personnel Resolution attached	Yes	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>
Agreements are attached and signature line for Chairman is marked with tab(s)/flag(s)	Yes	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>

CONTACT PERSON: Maria Benavides    PHONE: 624-7223

**SUBJECT:** Purchasing & Procurement Reorganization

**REQUEST(S):**

That the Board of Supervisors:

1. Receive a presentation regarding the proposed reorganization of the General Services Agency Purchasing Division, Procurement Unit.
2. Approve attached Personnel Resolution, pending meet and confer, to add 1.0 FTE Procurement Supervisor, 1.0 FTE Procurement Specialist III, 2.0 FTE Procurement Specialist I/II, and 3.0 FTE Procurement Technician I/II positions, and adopt new job classifications and compensation.
3. Approve attached Personnel Resolution, pending meet and confer, to Delete 2.0 FTE Buyer, 2.0 FTE Purchasing Assistant, and 1.0 FTE Contracts Coordinator positions.
4. Approve a 5% increase to the salary of the Purchasing Agent, Position No. 04536.
5. Authorize the Human Resources and Development Director and General Services Agency to initiate the layoff process, including the issuance of notices of layoff and meet and confer with affected unions.

**SUMMARY:**

**Introduction & Background**

In December 2017, the Board of Supervisors established the Tulare County General Services Agency (GSA), consolidating and integrating the County's internal service functions in an effort to realize efficiencies and increase customer service.

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As part of this action, the Board of Supervisors also integrated Purchasing into the newly established GSA, an action that consolidates many of the County's internal service functions into one Agency and provides additional support resources to the County's purchasing functions. As stated in that presentation, the three primary objectives of the Purchasing integration are as follows:

1. Institute a Proposed Reorganization of the Procurement Unit
2. Implement Process Improvements & Business Reforms
3. Produce Training & Procedure materials

This Agenda Item will outline the interrelationship of these three objectives, how they are integral to the constructive growth and improvement of the County's purchasing functions, and the details of the requested reorganization. All of these objectives are designed to support Purchasing and will ensure the County's procurement functions continue to be effective.

### **Customer Service Model**

These three objectives are each part of a single effort to create a new business paradigm within Purchasing. Specifically, this new business paradigm is a Customer Service Model, utilizing process efficiencies and effectiveness criteria to ensure that each customer's needs are acknowledged and met where possible.

The goal of this Customer Service Model is to develop an understanding that Purchasing is critical to the delivery of public services and acknowledge that County departments, as customers, need Purchasing in order to get their job done. These are central to the administrative need and purpose of Purchasing. Indeed, Purchasing is an important and vital part of County business, saving the County and taxpayers resources and protecting the County from liability.

The process improvements and business reforms to be implemented as part of the second objective will be in service to the mission of the Customer Service Model and will improve deliveries, either as a measurement of time or outcome variation reductions, to the end customer.

### **Proposed Reorganization of the Procurement Unit**

Purchasing is divided into three individual units: Administration, Surplus, and Procurement. **Attachment A** is an organization chart that shows the relationship of these units within Purchasing. All of the County's purchasing activities are managed in the Procurement unit, which includes Buyers, Purchasing Assistants, and a Contracts Coordinator, as shown on **Attachment B**.

The proposed reorganization would only affect the Procurement unit. **Attachment C** shows the proposed organizational structure of this unit. As shown in that attachment, if approved, the reorganization will create a conventional management

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structure, with a Supervisor for the unit and two classifications series: Procurement Specialists and Technicians.

This proposed reorganization will help implement the Customer Service Model by implementing a team-based internal management approach. In this approach, there will be three teams of one Specialist and one Technician each. Teams will have specific department assignments and which will enable each team the opportunity to know their customer's needs and activities more thoroughly.

In addition, this reorganization also includes the addition of two positions, which will address workload congestion, and increase investment from Purchasing staff in the customer's needs. The new hierarchy implemented by the proposed reorganization will also ensure that there is appropriate oversight of each individual team and that the Supervisor is available to address more complex matters. Further, this structure will allow for greater delegation of tasks within Purchasing to ensure time efficiencies and reasonable business flexibilities are being achieved.

Finally, as part of this reorganization, staff is requesting that the Board grant an increase of 5% to the Purchasing Agent's salary as a result of the increased management responsibilities and customer service expectations associated with the new business model.

In summary, this proposed reorganization is necessary for the new business paradigm, the "Customer Service Model," to be implemented effectively within the Procurement unit.

### **Process Improvements & Business Reforms**

The second of the three Purchasing Integration objectives is to conduct a review of the County's procurement business practices and procedures and make appropriate modifications to improve efficiency and effectiveness. After that review, the team will develop and implement a program of process improvements and business reforms. As with the proposed reorganization, the goal of this effort is to further implement the new business paradigm, the Customer Service Model, within Purchasing.

It is anticipated that this second objective will be complete by June 30, 2018, at which time, staff will provide a report or summary of the various process improvement recommendations. Based upon consultation with County department representatives and preliminary analyses of business practices, the team has divided the process improvement and business reform efforts into the following categories:

1. Generate Time & Processing Efficiencies - establish a baseline flowchart for all common documents, including document checklists, and the schedule for completing routine tasks.

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2. Develop Effective Communication Protocols - create a new culture of open communication with Departments, with a goal of supporting and understanding their needs.
3. Evaluate Throughput Efficiencies - maximize the efficient workflow of the Delivery Order, Blanket Purchase Order, and Sub-Purchase Order documents. Ensure that every process has quantifiable value and clear, independent merit.
4. Create Reasonable Business Flexibilities – potentially provide retroactive approvals, increase delegation (where appropriate) to ensure coverage of routine approvals, and allow for multi-year agreements.

### **Conclusion & Requested Action**

Integrating Purchasing into GSA and undertaking a business improvement program is a multi-step process. The first of these steps is the internal reorganization of the Procurement Unit as presented in this staff report. Ultimately, the goal of the three objectives listed above is to implement a new business paradigm, a Customer Service Model.

Within this new paradigm, the customer's needs will be managed alongside Purchasing's core purpose of protecting public resources and protecting the County's exposure to liability. As this integration process continues, each of these objectives will be implemented to support this new business paradigm.

In this way, as stated previously, the proposed reorganization is necessary to create a new business paradigm and customer service culture within Purchasing. Accordingly, staff is requesting that the Board of Supervisors approve the attached Personnel Resolution.

### **FISCAL IMPACT/FINANCING:**

The requested position changes, with a cost of approximately \$100,000, will have no Net County Cost to the General Fund for Fiscal Year 2017/18, as there are current operational savings in the Purchasing budget. In future years, the cost of these proposed changes will be offset through internal operational savings, particularly from reductions in Special Department Expenses.

### **LINKAGE TO THE COUNTY OF TULARE STRATEGIC BUSINESS PLAN:**

In accordance with the County's Strategic Business Plan Organizational Development Initiative, this action supports the continued internal growth and development of County departments and services.

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**DATE:** March 6, 2018

**ADMINISTRATIVE SIGN-OFF:**

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John Hess  
General Services Agency Director

Cc: Auditor-Controller  
County Counsel  
County Administrative Office (2)

Attachment(s)  
Attachment A Organization Chart of Purchasing Units  
Attachment B Current Procurement Unit Organization Chart  
Attachment C Proposed Procurement Unit Organization Chart  
Attachment D Personnel Resolution

**BEFORE THE BOARD OF SUPERVISORS  
COUNTY OF TULARE, STATE OF CALIFORNIA**

**IN THE MATTER OF APPROVING A** )  
**PURCHASING & PROCUREMENT** ) **Resolution No.** \_\_\_\_\_  
**REORGANIZATION** ) **Agreement No.** \_\_\_\_\_  
 )

UPON MOTION OF SUPERVISOR \_\_\_\_\_, SECONDED BY  
SUPERVISOR \_\_\_\_\_, THE FOLLOWING WAS ADOPTED BY THE  
BOARD OF SUPERVISORS, AT AN OFFICIAL MEETING HELD \_\_\_\_\_  
\_\_\_\_\_, BY THE FOLLOWING VOTE:

AYES:  
NOES:  
ABSTAIN:  
ABSENT:

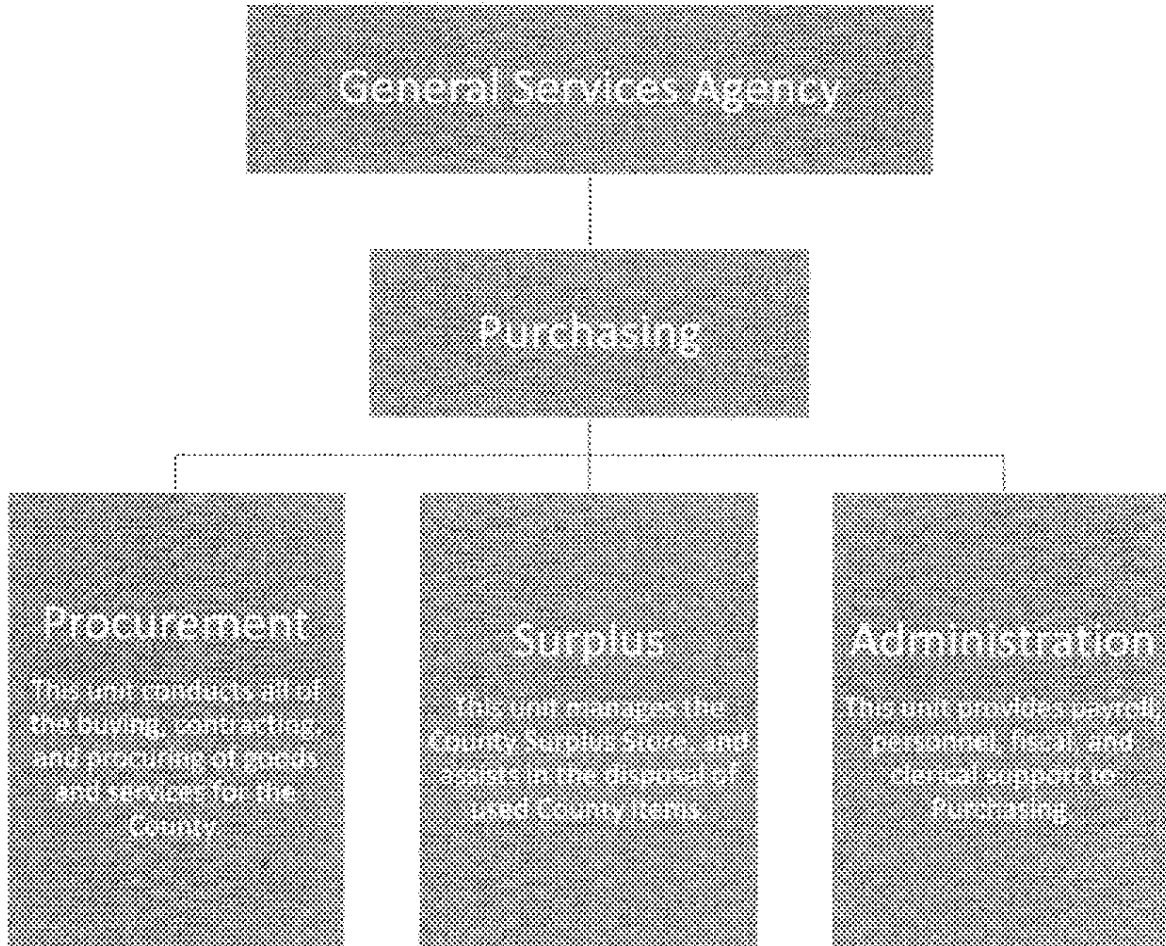
ATTEST: MICHAEL C. SPATA  
COUNTY ADMINISTRATIVE OFFICER/  
CLERK, BOARD OF SUPERVISORS

BY: \_\_\_\_\_  
Deputy Clerk

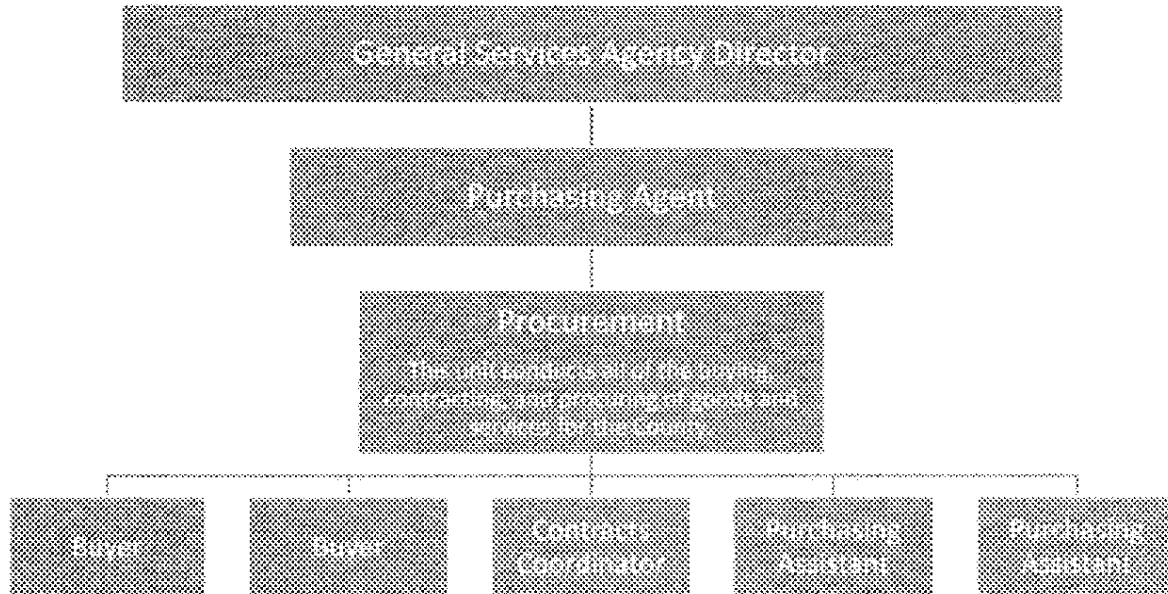
\* \* \* \* \*

1. Received a presentation regarding the proposed reorganization of the General Services Agency Purchasing Division, Procurement Unit.
2. Approved attached Personnel Resolution, pending meet and confer, to add 1.0 FTE Procurement Supervisor, 1.0 FTE Procurement Specialist III, 2.0 FTE Procurement Specialist I/II, and 3.0 FTE Procurement Technician I/II positions, and adopt new job classifications and compensation.
3. Approved attached Personnel Resolution, pending meet and confer, to Delete 2.0 FTE Buyer, 2.0 FTE Purchasing Assistant, and 1.0 FTE Contracts Coordinator positions.
4. Approved a 5% increase to the salary of the Purchasing Agent, Position No. 04536.
5. Authorized the Human Resources and Development Director and General Services Agency to initiate the layoff process, including the issuance of notices of layoff and meet and confer with affected unions.

Attachment A  
Organization Chart of Purchasing Units

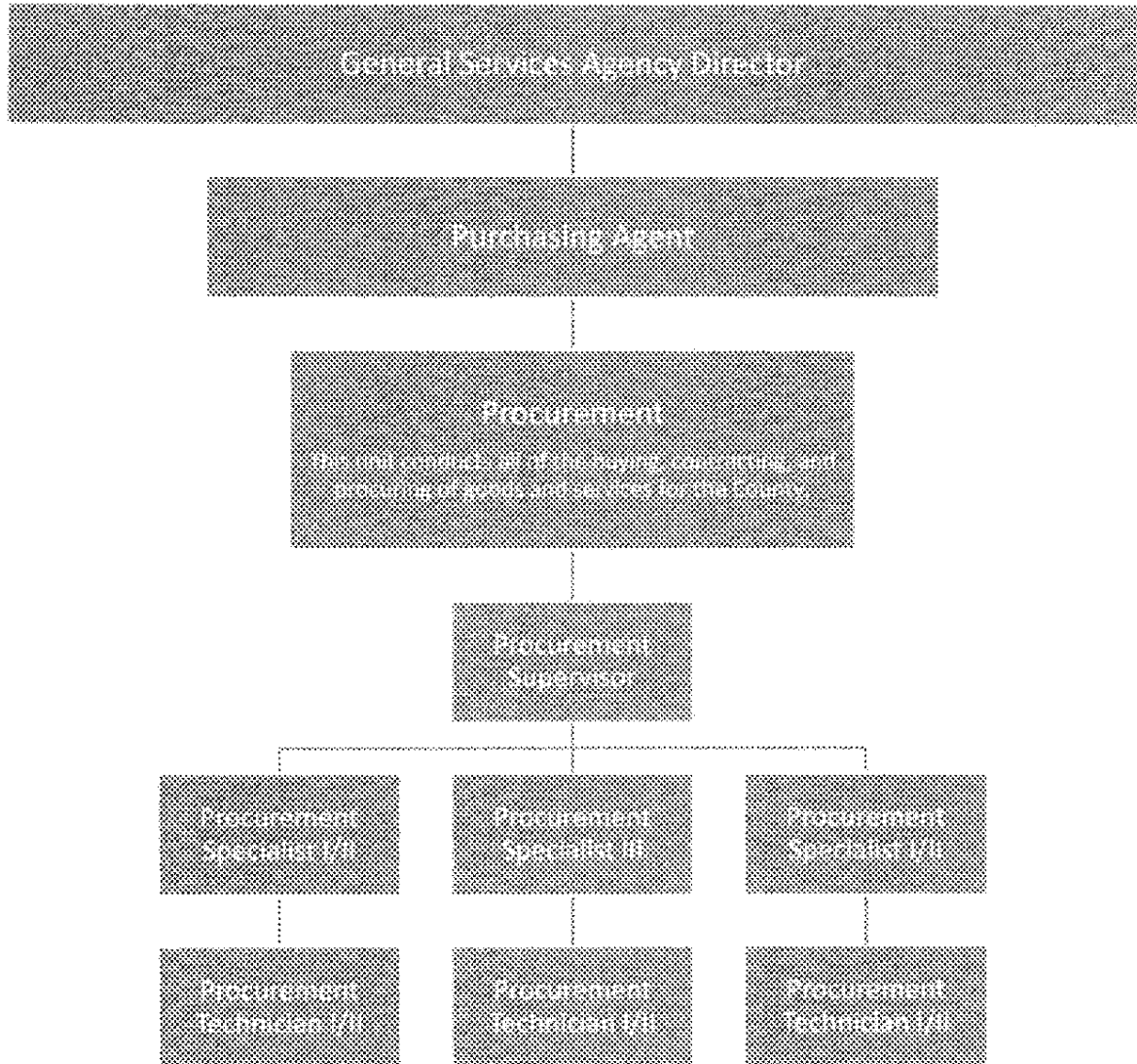


Attachment B  
Current Procurement Unit Organization Chart





Attachment C  
Proposed Procurement Unit Organization Chart



**BEFORE THE BOARD OF SUPERVISORS  
COUNTY OF TULARE, STATE OF CALIFORNIA**

IN THE MATTER OF NEW OR AMENDED        )       Resolution No. 2018-  
CLASS SPECIFICATIONS, CLASS            )       Agreement No.  
DESIGNATIONS AND COMPENSATION        )

Upon Motion of Supervisor (Name), seconded by Supervisor (Name), the following was adopted by the Board of Supervisors, at an official meeting held March 6, 2018 by the following vote:

- Ayes:
- Noes:
- Abstain:
- Absent:

Attest:                   Michael C. Spata  
                              County Administrative Officer/  
                              Clerk, Board of Supervisors

By: \_\_\_\_\_  
Deputy Clerk

\* \* \* \* \*

Adopt the following new or amended class specifications, class designations, and compensation effective: **March 18, 2018**

**Procurement Technician I**, Item No. 000910, Salary Grade: 651 (\$25,477 annual Step 5),  
Bargaining Unit 03, Competitive Service, Probation Period: 13 Pay Periods

**Procurement Technician II**, Item No. 000920, Salary Grade: 095 (\$39,025 annual Step 5),  
Bargaining Unit 03, Competitive Service, Probation Period: 13 Pay Periods

**Procurement Specialist I**, Item No. 081610, Salary Grade: 099 (\$46,108 annual Step 5),  
Bargaining Unit 03, Competitive Service, Probation Period: 13 Pay Periods

**Procurement Specialist II**, Item No. 081620, Salary Grade: 093 (\$51,179 annual Step 5),  
Bargaining Unit 03, Competitive Service, Probation Period: 13 Pay Periods

**Procurement Specialist III**, Item No. 081630, Salary Grade: 094 (\$61,536 annual Step 5),  
Bargaining Unit 03, Competitive Service, Probation Period: 13 Pay Periods

**Procurement Specialist, Supervisor**, Item No. 081600, Salary Grade: 092 (\$66,023 annual Step 5),  
Bargaining Unit 07, Competitive Service, Probation Period: 13 Pay Periods

## **PROCUREMENT SPECIALIST I**

County of Tulare

### **DEFINITION**

To purchase supplies, materials, food, and equipment in the required quantity and quality; to obtain items via formal contracts utilizing advertised invitations for bid and request for quotations for County departments and central supply; and to prepare and execute activities necessary to establish contracts for the provision of services.

### **DISTINGUISHING CHARACTERISTICS**

The Procurement Specialist I is an entry level position in the Procurement Specialist class series. Incumbents will be given assignments which require initiative, resourcefulness, independent decision making and the exercise of good judgment. It is expected that the incumbent will continuously develop his or her knowledge and skill set in order to perform at the II level.

### **SUPERVISION RECEIVED AND EXERCISED**

Direct Supervision is provided by the Supervising Procurement Specialist or the County Purchasing Agent.

May provide technical direction to lower level Procurement staff.

### **DUTIES**

Receive, review, process and approve requisitions for supplies, materials and equipment.

Administer and monitor contract agreements for legal compliance.

Confer with County Counsel, Risk Management, Auditor's and Clerk Recorder's Office on contract requirements to ensure contract compliance.

Confer with department officials and representatives concerning procedures, specifications, needs, concerns and complaints.

Confer with vendors to obtain product or service information, such as price, availability and delivery schedule.

Discuss defective or unacceptable goods or services with inspection or quality control personnel users, vendors, and others to determine source of trouble and take corrective action.

Prepare, receive, and analyze bids, quotes, proposals, systems, and specifications and other documents necessary to purchase supplies, materials, equipment, and services.

Locate source of supplies and place orders.

Invite and accept bids, and evaluate prices, discounts offered, delivery conditions, and products offered.

Compare costs and quality of products offered from a variety of vendors.

Advise on selection of products for purchase by testing, observing, or examining items and provide estimates of values according to knowledge of market value.

Interview and correspond with vendors and representatives regarding products, complaints, and shipping

County of Tulare  
Procurement Specialist I

and delivery problems

Maintain current information on new products, market conditions, and product trends.

Review bids, proposals, requisitions, contracts and various other procurement requests for conformance to legal requirements, price, and acceptability of items as specified.

Determine vendor/provider from which purchase/service will be made/used, and issue contract.

Advise department representatives on purchase methods and alternate products and may recommend substitutes.

Negotiate contracts or agreements for commodities or service when competitive bidding is not necessary.

Coordinate and facilitate the planning of procurement of goods and services with vendors and other departments. Such as arrange for and attend tests, site visits, and demonstrations of equipment.

Maintain manual and/or computerized procurement records of vendors and various other detailed purchasing records such as items or services purchased, costs, delivery, product quality or performance and inventories.

Prepare and write reports and correspondence.

Maintain individual workload statistics.

Serve as an advisor to subordinate Procurement Staff on unusual or complex policy items.

Assist the Purchasing Agent and the Supervising Procurement Specialist in making presentations or conducting group trainings.

Provide responsive, high quality service to County employees, vendors, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

May be required to perform the functions of the lower level classes in this series.

Essential job duties may be assigned that are not listed above but are relative to this job classification. (Reasonable accommodation will be made when requested and determined by the County to be appropriate under applicable law.)

**MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the education, training, experience, special skills and/or license which are required and equivalent to the following.

**Knowledge of:**

- Principles, methods and approved practices of public sector purchasing and central purchasing system.
- County customer service objectives and strategies.

County of Tulare  
Procurement Specialist I

- Telephone, office, and online etiquette.
- General business practices, procedures, and recordkeeping methods.
- County departmental functions and their material and service needs.
- Sources of supply, material, equipment and services, market conditions, and price trends of various materials, equipment, and supplies.
- Relevant regulations and laws relating to public agency purchasing transactions.
- Contracting law, Uniform Commercial Code, and other laws and regulations pertaining to the solicitation of bids/proposals, evaluation of offers, negotiations and awarding contracts.
- Product research and evaluation.
- Types of equipment, machines and appliances, and their features and uses.
- Purchasing terminology, documents and records.

**Skill/Ability to:**

- Effectively communicate orally and in writing.
- Perform Cost and price analysis.
- Read, interpret and explain laws, rules and office policies and procedures.
- Supervise County credit card purchases.
- Compile data for purposes of bidding and awarding contracts.
- Analyze requisitions and prepare product specifications.
- Evaluate a variety of technical and complex bids for supplies, equipment, materials and services, and make awards.
- Establish and maintain effective working relationships with management, employees, County officials, the public and representatives of vendors and suppliers.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Keep current with changes in the market, products and trends.
- Organize, and prioritize workload to meet deadlines and operating needs.
- Devise, institute and monitor purchasing record keeping systems.

County of Tulare  
Procurement Specialist I

- Prepare and write reports, correspondence and data logs.
- Perform basic math sufficient to review purchase records and invoices for accuracy and use and calculate measuring units.
- File records alphabetically and numerically.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or making appropriate referral.
- Answer questions and release information according to department guidelines and policies.
- Analyze and project consequences of decisions and/or recommendations.
- Work and communicate effectively with people of various education and socioeconomic backgrounds by respecting beliefs, interpersonal styles and behaviors of both clients and co-workers.
- Operate contemporary office equipment inclusive of computer, keyboard, and all applicable electronic equipment.

**Education:**

- Bachelor's degree from an accredited college or university, in business administration, accounting, finance, marketing, economics or a closely related field;

**Experience:**

- Two (2) years of progressively responsible buying experience purchasing a variety of commodities and services in a highly regulated central purchasing environment, service industry, or public agency; OR

**Equivalencies:**

- An Associate's Degree from an accredited college or university in business administration, accounting, finance, marketing, economics or closely related field AND One (1) year of experience equivalent to a Procurement Technician II with the County of Tulare.

**LICENSE OR CERTIFICATE**

Possession of, or ability to obtain an appropriate, valid California driver's license.

**DESIRABLE CERTIFICATE**

Possession of a valid Certified Public Procurement Officer (C.P.P.O.) or Certified Professional Public Buyer (C.P.P.B) certificate from the Universal Public Procurement Certification Council.

{Procurement Specialist I} Job Code:081610. Res: XX-XXXX. Updated: 03/15

Supplemental information.  
Overcome Status: Covered  
Probation: Six (6) months

County of Tulare  
Procurement Specialist I

80:03

## **PROCUREMENT SPECIALIST II**

County of Tulare

### **DEFINITION**

To purchase supplies, materials, food, and equipment in the required quantity and quality; to obtain items via formal contracts utilizing advertised invitations for bid and request for quotations for County departments and central supply, and to prepare and execute activities necessary to establish contracts for the provision of services. This position is subject to standby and callback assignments.

### **DISTINGUISHING CHARACTERISTICS**

The Procurement Specialist II is a journey level position in the Procurement Specialist class series. Incumbents will be given assignments, which require initiative, resourcefulness, independent decision making and the exercise of good judgment.

### **SUPERVISION RECEIVED AND EXERCISED**

Direct Supervision is provided by the Supervising Procurement Specialist or the County Purchasing Agent. May provide technical direction to lower level Procurement staff.

### **DUTIES**

Receive, review, process and approve requisitions for supplies, materials and equipment.

Administer and monitor contract agreements for legal compliance.

Confer with County Counsel, Risk Management, Auditor's and Clerk Recorder's Office on contract requirements to ensure contract compliance.

Confer with department officials and representatives concerning procedures, specifications, needs, concerns and complaints.

Confer with vendors to obtain product or service information, such as price, availability and delivery schedule.

Discuss defective or unacceptable goods or services with inspection or quality control personnel users, vendors, and others to determine source of trouble and take corrective action.

Prepare, receive, and analyze bids, quotes, proposals, systems, and specifications and other documents necessary to purchase supplies, materials, equipment, and services.

Locate source of supplies and place orders.

Invite and accept bids, and evaluate prices, discounts offered, delivery conditions, and products offered.

Compare costs and quality of products offered from a variety of vendors.

Advise on selection of products for purchase by testing, observing, or examining items and provide estimates of values according to knowledge of market value.

Interview and correspond with vendors and representatives regarding products, complaints, and shipping and delivery problems.

Maintain current information on new products, market conditions, and product trends.

Review bids, proposals, requisitions, contracts and various other procurement requests for conformance to legal requirements, price, and acceptability of items as specified.



County of Tulare  
Procurement Specialist II

Determine vendor/provider from which purchase/service will be made/used, and issue contract.

Advise department representatives on purchase methods and alternate products and may recommend substitutes.

Negotiate contracts or agreements for commodities or service when competitive bidding is not necessary.

Coordinate and facilitate the planning of procurement of goods and services with vendors and other departments.

Arrange for and attend tests, site visits, and demonstrations of equipment.

Maintain manual and/or computerized procurement records of vendors and various other detailed purchasing records such as items or services purchased, costs, delivery, product quality or performance and inventories.

Prepare and write reports and correspondence.

Maintain individual workload statistics.

Serve as an advisor to subordinate Procurement Staff on unusual or complex policy items.

Assist the Purchasing Agent and the Supervising Procurement Specialist in making presentations or conducting group trainings.

Provide responsive, high quality service to County employees, vendors, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

May be required to perform the functions of the lower level classes in this series.

Essential job duties may be assigned that are not listed above but are relative to this job classification. (Reasonable accommodation will be made when requested and determined by the County to be appropriate under applicable law.)

### **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the education, training, experience, special skills and/or license which are required and equivalent to the following.

#### **Knowledge of:**

- Principles, methods and approved practices of public sector purchasing and central purchasing system.
- County customer service objectives and strategies; telephone, office, and online etiquette.
- General business practices, procedures, and recordkeeping methods.
- County departmental functions and their material and service needs.

County of Tulare  
Procurement Specialist II

- Sources of supply, material, equipment and services, market conditions, and price trends of various materials, equipment, and supplies
- Relevant regulations and laws relating to public agency purchasing transactions.
- Contracting law, Uniform Commercial Code, and other laws and regulations pertaining to the solicitation of bids/proposals, evaluation of offers, negotiations and awarding contracts.
- Product research and evaluation.
- Types of equipment, machines and appliances, and their features and uses.
- Purchasing terminology, documents and records

**Skill/Ability to:**

- Train, lower level Procurement staff.
- Effectively communicate orally and in writing.
- Perform Cost and price analysis.
- Read, interpret and explain laws, rules and office policies and procedures.
- Compile data for purposes of bidding and awarding contracts.
- Analyze requisitions and prepare product specifications
- Evaluate a variety of technical and complex bids for supplies, equipment, materials and services, and make awards.
- Establish and maintain effective working relationships with management, employees, County officials, the public and representatives of vendors and suppliers.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Keep current with changes in the market, products and trends.
- Organize, and prioritize workload to meet deadlines and operating needs
- Devise, institute and monitor purchasing record keeping systems.
- Prepare and write reports, correspondence and data logs.
- Perform basic math sufficient to review purchase records and invoices for accuracy and use and calculate measuring units.
- File records alphabetically and numerically.

County of Tulare  
Procurement Specialist II

- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or making appropriate referral.
- Analyze and project consequences of decisions and/or recommendations

Work and communicate effectively with people of various education and socioeconomic backgrounds by respecting beliefs, interpersonal styles and behaviors of both clients and co-workers.

Operate contemporary office equipment inclusive of computer, keyboard, and all applicable electronic equipment.

**Education:**

- Bachelor's degree from an accredited college or university, in business administration, accounting, finance, marketing, economics or a closely related field

**Experience:**

- Four (4) years of progressively responsible buying experience purchasing a variety of commodities and services in a highly regulated central purchasing environment, service industry, or public agency

**Equivalencies:**

- An Associate's Degree from an accredited college or university in business administration, accounting, finance, marketing, economics or closely related field AND Two (2) years of experience equivalent to a Procurement Specialist I with the County of Tulare.

**LICENSE OR CERTIFICATE**

Possession of, or ability to obtain an appropriate, valid California driver's license

**DESIRABLE CERTIFICATE**

Possession of a valid Certified Public Procurement Officer (C.P.P.O.) or Certified Professional Public Buyer (C.P.P.B) certificate from the Universal Public Procurement Certification Council.

{Procurement Specialist III} Job Code:091620. Res: XX-XXXX, Updated: 03/15

Supplemental Information:

Overtime Status: Exempt

Probation: Six (6) months

SL: 03

## **PROCUREMENT SPECIALIST III**

County of Tulare

### **DEFINITION**

To purchase supplies, materials, food, and equipment in the required quantity and quality; to obtain items via formal contracts utilizing advertised invitations for bid and request for quotations for County departments and central supply; and to prepare and execute activities necessary to establish contracts for the provision of services. This position is subject to standby and callback assignments.

### **DISTINGUISHING CHARACTERISTICS**

The Procurement Specialist III is a lead in the Procurement Specialist class series. Incumbents in this class may be required to train/mentor the Procurement Specialist I/II in the areas of research, analysis, and coordination of activities.

### **SUPERVISION RECEIVED AND EXERCISED**

Direct Supervision is provided by the Supervising Procurement Specialist or the County Purchasing Agent.

Responsibilities include indirect supervision and technical direction of lower level Procurement staff

### **DUTIES**

may include, but are not necessarily limited to:

Receive, review, process and approve requisitions for supplies, materials and equipment.

Administer and monitor contract agreements for legal compliance.

Confer with County Counsel, Risk Management, Auditor's and Clerk Recorder's Office on contract requirements to ensure contract compliance.

Confer with department officials and representatives concerning procedures, specifications, needs, concerns and complaints.

Confer with vendors to obtain product or service information, such as price, availability and delivery schedule.

Discuss defective or unacceptable goods or services with inspection or quality control personnel users, vendors, and others to determine source of trouble and take corrective action.

Prepare, receive, and analyze bids, quotes, proposals, systems, and specifications and other documents necessary to purchase supplies, materials, equipment, and services.

Locate source of supplies and place orders.

Invite and accept bids, and evaluate prices, discounts offered, delivery conditions, and products offered.

Compare costs and quality of products offered from a variety of vendors.

Advise on selection of products for purchase by testing, observing, or examining items and provide estimates of values according to knowledge of market value.

Interview and correspond with vendors and representatives regarding products, complaints, and shipping and delivery problems.

Maintain current information on new products, market conditions, and product trends

Review bids, proposals, requisitions, contracts and various other procurement requests for conformance to legal

County of Tulare  
Procurement Specialist III

requirements, price, and acceptability of items as specified.

Determine vendor/provider from which purchase/service will be made/used, and issue contract.

Advise department representatives on purchase methods and alternate products and may recommend substitutes.

Negotiate contracts or agreements for commodities or service when competitive bidding is not necessary.

Coordinate and facilitate the planning of procurement of goods and services with vendors and other departments.

Arrange for and attend tests, site visits, and demonstrations of equipment.

Maintain manual and/or computerized procurement records of vendors and various other detailed purchasing records such as items or services purchased, costs, delivery, product quality or performance and inventories.

Prepare reports and correspondence.

Maintain individual workload statistics.

Serve as an advisor to subordinate Procurement Staff on unusual or complex policy items.

Assist the Purchasing Agent, and the Supervising Procurement Specialist in making presentations or conducting group trainings.

Provide responsive, high quality service to County employees, vendors, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

May be required to perform the functions of the lower level classes in this series.

Essential job duties may be assigned that are not listed above but are relative to this job classification. (Reasonable accommodation will be made when requested and determined by the County to be appropriate under applicable law.)

### **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the education, training, experience, special skills and/or license which are required and equivalent to the following.

#### **Knowledge of:**

- Principles, methods and approved practices of public sector purchasing and central purchasing system.
- Principles of employee lead supervision and training.
- County customer service objectives and strategies: telephone, office, and online etiquette.
- General business practices, procedures, and recordkeeping methods
- County departmental functions and their material and service needs.
- Sources of supply, material, equipment and services, market conditions, and price trends of various materials, equipment, and supplies.
- Relevant regulations and laws relating to public agency purchasing transactions.

County of Tulare  
Procurement Specialist III

- Contracting law, Uniform Commercial Code, and other laws and regulations pertaining to the solicitation of bids/proposals, evaluation of offers, negotiations and awarding contracts.
- Product research and evaluation.
- Types of equipment, machines and appliances, and their features and uses.
- Purchasing terminology, documents and records

**Skill/Ability to:**

- Train, lower level Procurement staff
- Effectively communicate orally and in writing
- Perform Cost and price analysis.
- Read, interpret and explain laws, rules and office policies and procedures.
- Compile data for purposes of bidding and awarding contracts.
- Analyze requisitions and prepare product specifications.
- Evaluate a variety of technical and complex bids for supplies, equipment, materials and services, and make awards.
- Establish and maintain effective working relationships with management, employees, County officials, the public and representatives of vendors and suppliers
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Keep current with changes in the market, products and trends.
- Organize and prioritize workload to meet deadlines and operating needs.
- Devise, institute and monitor purchasing record keeping systems.
- Prepare and write reports, correspondence and data logs.
- Perform basic math sufficient to review purchase records and invoices for accuracy and use and calculate measuring units.
- File records alphabetically and numerically.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or making appropriate referral.
- Analyze and project consequences of decisions and/or recommendations.

County of Tulare  
Procurement Specialist III

**Education:**

- Bachelors degree from an accredited college or university, in business administration, accounting, finance, marketing, economics or a closely related field.

**Experience:**

- Five (5) years of progressively responsible buying experience at a professional or senior level, purchasing a variety of commodities and services in a highly regulated central purchasing environment, service industry, or public agency.

**Equivalencies:**

- An Associate's Degree from an accredited college or university in business administration, accounting, finance, marketing, economics or closely related field AND Two (2) years of experience equivalent to a Procurement Specialist II with the County of Tulare.

**LICENSE OR CERTIFICATE**

Possession of, or ability to obtain an appropriate, valid California driver's license.

**DESIRABLE CERTIFICATE**

Possession of a valid Certified Public Procurement Officer (C.P.P.O.) or Certified Professional Public Buyer (C.P.P.B) certificate from the Universal Public Procurement Certification Council.

[Procurement Technician III] Job Code:081830, Res: XX-XXXX, Updated: 03/15

Supplemental Information

Overtime Status: Exempt

Probation: Six (6) months

BU: 03

# **PROCUREMENT TECHNICIAN I**

County of Tulare

## **DEFINITION**

To perform a wide variety of general purchasing clerical duties including examine, prepare and process legal documents relating to the procurement of a variety of service, supplies, materials and equipment and to provide responsible office assistance in the central purchasing department.

## **DISTINGUISHING CHARACTERISTICS**

This is the entry worker level class of the Procurement Technician series. Incumbents of positions allocated to this class are expected to perform routine purchasing and clerical duties within the Purchasing Department which require close supervision. Incumbents are assigned routine duties on an independent basis as proficiency is demonstrated, and as assigned responsibility and breadth of knowledge increase with experience. This level requires the knowledge of office procedures and alternatives in solving routine problems. Work is normally reviewed upon completion.

## **SUPERVISION RECEIVED AND EXERCISED**

Supervision is provided by a Supervising Procurement Specialist or higher level Department staff.

Indirect technical direction may be provided by the Procurement Specialist III or higher level staff.

## **DUTIES**

Review, approve, and process purchase requisitions and other procurement documents within monetary authority limits, for accuracy, appropriate supportive documentation and compliance with State Procurement Code, County Ordinance Code and other legal requirements.

Assist with providing maintenance, data entry, and enhancements for an automated procurement and contract tracking system, vendor database files, and other related automated or manual files.

Review, prepare and process all procurement documents for distribution, scanning, or indexing.

Prepare Notice of Completion Records for recordation with Clerk Recorder

Examine various service and material agreements for accuracy and completeness to determine their acceptability for processing.

Cite State and County laws, rules, regulations and policies which provide the basis for the acceptance or rejection of documents received.

Assist in the preparation of bid specifications and recaps.

Interview and correspond with vendors and representatives regarding products, complaints, shipping, and delivery problems.

Prepare and review various service and materials agreement folders, forms and supplemental documents.

Confer with department heads and representatives regarding purchasing needs and specifications.



County of Tulare  
Procurement Technician I

Keep informed of market conditions, trends and products.

Advise departments and the public regarding sale procedures of surplus property.

Consult with County Auditor concerning budget expenditures procedures to respond to inquiring department.

Perform computations on bid prices such as extensions, discounts, totals, and quantities.

Maintain files and records.

Prepare reports and correspondence.

Type/keyboard, proofread, and process a variety of documents including general correspondence, memos, forms, and statistical charts from rough drafts (handwritten, typed or computer) or verbal instructions.

Send surveys and update notifications for service and product contracts and compose reports.

Act as a receptionist, answer telephone calls and wait on the public, giving information on Department policies and procedures as required

Perform a variety of supportive office functions including receive, sort and distribute incoming and outgoing correspondence; order, store and distribute office supplies.

Plan and complete work according to schedules and suggest minor changes in procedures to improve processes.

Perform routine office equipment checks to determine cause of problem and report needed repairs. Undertake and complete a variety of office assistance projects requiring independent judgment, and initiative.

Essential job duties may be assigned that are not listed above but are relative to this job classification. (Reasonable accommodation will be made when requested and determined by the County to be appropriate under applicable law.)

### **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the education, training, experience, special skills and/or license which are required and equivalent to the following.

#### **Knowledge of:**

- Math sufficient to review purchase orders and invoices for accuracy.
- Purchasing procedures and terminology.
- Office procedures and recordkeeping methods.

County of Tulare  
Procurement Technician I

**Skill/Ability to:**

- Read and understand information provided in such items as contract laws and materials specification.
- Write clearly using correct grammar, spelling and punctuation sufficient to prepare correspondence, materials descriptions, and drafts of contracts.
- Courteously, patiently and tactfully obtain and evaluate information received in communicating with vendors, County departments, and the public.
- Evaluate and analyze information to formulate recommendations.
- Give and follow verbal and written instructions.
- File alphabetically and numerically.
- Maintain records.
- Retain and recall factual information.
- Proofread for accuracy.
- Establish and maintain effective working relationships with vendors, departments, agencies and the public.
- Adjust to changes in work load and deadlines, and work under pressure of meeting deadlines.

**Education:**

- Equivalent to the completion of two years of college with a major coursework in public, or business administration, economics, accounting, or a closely related field.

**Experience:**

- Two (2) years of progressively responsible experience in a highly regulated central purchasing environment, or equivalent purchasing experience involving the review, preparation, and processing of various legal documents including requisitions, purchase orders, agreements, contracts, delivery orders, specifications, bids, and working with vendors

**LICENSE OR CERTIFICATE**

Possession of, or ability to obtain an appropriate, valid California driver's license.

## DESIRABLE EMPLOYMENT STANDARDS

### Knowledge of:

- Contract laws and the preparation of contracts to meet County requirements.
- County departmental functions and their material and service needs.

### Skill/Ability to:

- Assign and review the work of support and technical staff.

[Procurement Technician I] Job Code:000910, Res: XX-XXXX, Updated: 03/16

Supplemental Information:

Overtime Status: Covered

Probation: Six (6) months

SU: 93

## **PROCUREMENT TECHNICIAN II**

County of Tulare

### **DEFINITION**

To perform a wide variety of general and specialized purchasing clerical duties including examine, prepare and process legal documents relating to the procurement of a variety of service, supplies, materials and equipment and to provide responsible office assistance in the central purchasing department, and to act as lead worker.

### **DISTINGUISHING CHARACTERISTICS**

This is the journey worker level class of the Procurement Technician series. Incumbents of positions allocated to this class are expected to perform the more difficult and complex purchasing and clerical duties within the Purchasing Department which require comprehensive knowledge of difficult procurement with only occasional instruction or assistance. This level requires the knowledge of office procedures and alternatives in solving routine problems. Work is normally reviewed on completion.

### **SUPERVISION RECEIVED AND EXERCISED**

Direct supervision is provided by a Supervising Procurement Specialist or higher level Department staff

Indirect technical direction may be provided by the Procurement Specialist III or higher level staff.

Responsibilities include lead direction of the Procurement Technician I.

### **DUTIES**

Review, approve, and process purchase requisitions and other procurement documents within monetary authority limits, for accuracy, appropriate supportive documentation and compliance with State Procurement Code, County Ordinance Code and other legal requirements.

Assist with providing maintenance, data entry, and enhancements for an automated procurement and contract tracking system, vendor database files, and other related automated or manual files.

Review, prepare and process all procurement documents for distribution, scanning, or indexing.

Prepare Notice of Completion Records for recordation with Clerk Recorder

Examine various service and material agreements for accuracy and completeness to determine their acceptability for processing

Cite State and County laws, rules, regulations and policies which provide the basis for the acceptance or rejection of documents received.

Assist in the preparation of bid specifications and recaps.

Interview and correspond with vendors and representatives regarding products, complaints, shipping, and delivery problems.

Prepare and review various service and materials agreement folders, forms and supplemental documents.

Confer with department heads and representatives regarding purchasing needs and specifications

County of Tulare  
Procurement Technician II

Keep informed of market conditions, trends and products.

Advise departments and the public regarding sale procedures of surplus property.

Consult with County Auditor concerning budget expenditures procedures to respond to inquiring department.

Perform computations on bid prices such as extensions, discounts, totals, and quantities.

Maintain files and records.

Prepare reports and correspondence.

Type/keyboard, proofread, and process a variety of documents including general correspondence, memos, forms, and statistical charts from rough drafts (handwritten, typed or computer) or verbal instructions.

Send surveys and update notifications for service and product contracts and compose reports

Act as a receptionist, answer telephone calls and wait on the public, giving information on Department policies and procedures as required.

Perform a variety of supportive office functions including receive, sort and distribute incoming and outgoing correspondence; order, store and distribute office supplies.

Plan and complete work according to schedules and suggest minor changes in procedures to improve processes.

Perform routine office equipment checks to determine cause of problem and report needed repairs. Undertake and complete a variety of office assistance projects requiring independent judgment, and initiative.

Essential job duties may be assigned that are not listed above but are relative to this job classification. (Reasonable accommodation will be made when requested and determined by the County to be appropriate under applicable law.)

### **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the education, training, experience, special skills and/or license which are required and equivalent to the following.

#### **Knowledge of:**

- Math sufficient to review purchase orders and invoices for accuracy.
- Purchasing procedures and terminology.
- Office procedures and recordkeeping methods.

County of Tulare  
Procurement Technician II

**Skill/Ability to:**

- Read and understand information provided in such items as contract laws and materials specification.
- Write clearly using correct grammar, spelling and punctuation sufficient to prepare correspondence, materials descriptions, and drafts of contracts.
- Courteously, patiently and tactfully obtain and evaluate information received in communicating with vendors, County departments, and the public.
- Evaluate and analyze information to formulate recommendations.
- Give and follow verbal and written instructions.
- File alphabetically and numerically.
- Maintain records.
- Retain and recall factual information.
- Proofread for accuracy.
- Establish and maintain effective working relationships with vendors, departments, agencies and the public.
- Adjust to changes in work load and deadlines, and work under pressure of meeting deadlines.

**Education:**

- Equivalent to the completion of two years of college with a major coursework in public, or business administration, economics, accounting, or a closely related field.

**Experience:**

- One (1) year equivalent to a Procurement Technician I with the County of Tulare.

**LICENSE OR CERTIFICATE**

Possession of, or ability to obtain an appropriate, valid California driver's license.

## DESIRABLE EMPLOYMENT STANDARDS

### Knowledge of:

- Contract laws and the preparation of contracts to meet County requirements.
- County departmental functions and their material and service needs.

### Skill/Ability to:

- Assign and review the work of support and technical staff.

[Procurement Technician II] Job Code:000920, Res. XX-XXXX, Updated: 03/18

Supplemental Information:  
Overtime Status: Covered  
Probation: Six (6) months  
BL: 02

# **SUPERVISING PROCUREMENT SPECIALIST**

**County of Tulare**

## **DEFINITION**

To perform specialized procurement of commodities and professional services for County departments and central supply and to prepare and execute activities necessary to establish contracts for the provision of services. The Supervising classification performs the most difficult and complex work of the Procurement Specialist series. This position is subject to standby and callback assignments.

## **SUPERVISION RECEIVED AND EXERCISED**

Direction is provided by the County Purchasing Agent.

Responsibilities include the direct supervision of lower level Procurement Staff.

## **DUTIES**

may include, but are not necessarily limited to:

Receive, review, and process requisitions for supplies, materials and equipment.

Confer with County Counsel, Risk Management, Auditor's and Clerk Recorder's Office on contract requirements to ensure contract compliance.

Confer with department officials concerning procedures, specifications, needs, concerns, and complaints.

Confer with vendors to obtain product or service information, such as price, availability, and delivery schedule.

Discuss defective or unacceptable goods or services with inspection or quality control personnel users, vendors, and others to determine source of trouble and take corrective action.

Prepare bid specifications and other documents necessary to purchase supplies, materials, equipment, and services.

Research and locate source of supplies and place orders.

Invite and accept bids, and evaluate prices, discounts offered, delivery conditions, and products offered. Compare costs and quality of products offered from a variety of vendors.

Advise on selection of products for purchase by testing, observing, or examining items and provide estimates of values according to knowledge of market value.

Advise department representatives on purchase methods and alternate products and may recommend substitutes.

Interview and correspond with customers, vendors, and representatives.

Maintain current information on new products, market conditions, and product trends.

Review bids, requisitions, contracts, and various other procurement requests for conformance to legal requirements, price, and acceptability of items as specified.

Determine vendor/provider from which purchase/service will be made/used, and issue contract.

Negotiate contracts or agreements for commodities or service when competitive bidding is not necessary.

Coordinate and facilitate the planning for procurement of goods and services with vendors and other departments. Such as arrange for and attend tests, site visits, and demonstrations of equipment.



## County of Tulare Supervising Procurement Specialist

Maintain manual and/or computerized procurement records of vendors and various other detailed purchasing records such as items or services purchased, costs, delivery, product quality or performance, and inventories.

Prepare reports and correspondence.

Participate in hiring of staff.

Prepare and issue performance evaluations and disciplinary processes.

Direct and review work of subordinate procurement staff processing unusual or complex procurement or policy items.

Assist the Purchasing Agent and the Procurement Specialists in making presentations or conducting group trainings.

Provides responsive, high quality service to County employees, vendors, representatives of outside agencies and members of the public by providing accurate, complete, and up-to-date information, in a courteous, efficient, and timely manner.

Essential job duties may be assigned that are not listed above but are relative to this job classification. (Reasonable accommodation will be made when requested and determined by the County to be appropriate under applicable law.)

### **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the education, training, experience, special skills and/or license which are required and equivalent to the following.

#### **Knowledge of:**

- Principles, methods and approved practices of public sector purchasing and central purchasing system.
- General business practices and procedures.
- Sources of supply, material, equipment and services, market conditions, and price trends of various materials, equipment, and supplies.
- Relevant regulations and laws relating to public agency purchasing transactions.
- Contracting law, Uniform Commercial Code, and other laws and regulations pertaining to the solicitation of bids/proposals, evaluation of offers, negotiations and awarding contracts.
- Product research and evaluation.
- Types of equipment, machines and appliances, and their features and uses.
- Purchasing terminology, documents, and records.
- Principles of employee supervision and training.
- County customer service objectives and strategies; telephone, office, and online etiquette.

#### **Skill/Ability to:**

- Supervise, train, and evaluate subordinates.

County of Tulare  
Supervising Procurement Specialist

- Effectively communicate orally and in writing
- Perform cost and price analysis
- Read, interpret, and explain laws, rules and office policies and procedures.
- Compile data for purposes of bidding and awarding contracts
- Evaluate requisitions and product specifications.
- Evaluate a variety of technical and complex bids for supplies, equipment, materials and services, and make awards
- Establish and maintain effective working relationships with management, employees, County officials, the public and representatives of vendors and suppliers.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or making appropriate referral.
- Analyze and project consequences of decisions and/or recommendations.
- Organize and prioritize division workload to meet deadlines and operating needs.
- Devise, institute, and monitor purchasing record keeping systems.
- Prepare and write reports, correspondence, and data logs.
- Follow written and oral instructions.
- Perform basic math. Use and calculate measuring units.
- File records alphabetically and numerically.

Work and communicate effectively with people of various education and socioeconomic backgrounds by respecting beliefs, interpersonal styles and behaviors of both clients and co-workers.

Operate contemporary office equipment inclusive of computer, keyboard, and all applicable electronic equipment.

**Education:**

- Bachelor's degree from an accredited college or university, in business administration, accounting, finance, marketing, economics or a closely related field.

AND

**Experience:**

- Six (6) years of progressively responsible buying experience at a professional or senior level, purchasing a variety of commodities and services in a highly regulated central purchasing

County of Tulare  
Supervising Procurement Specialist

environment, service industry, or public agency.

**Equivalencies:**

An Associate's degree from an accredited college or university in business administration, accounting, finance, marketing, economics or closely related field AND Two (2) years of experience equivalent to a Procurement Specialist III with the County of Tulare.

**LICENSE OR CERTIFICATE**

Possession of, or ability to obtain an appropriate, valid California driver's license.

**DESIRABLE CERTIFICATE**

Possession of a valid Certified Public Procurement Officer (C.P.P.O.) or Certified Professional Public Buyer (C.P.P.B) certificate from the Universal Public Procurement Certification Council.

[Supervising Procurement Specialist] Job Code:081600, Res: XX-XXXX, Updated: 03/18

Supplemental Information

Overtime Status: Exempt

Probation: Six (6) months

BLE 07

# BEFORE THE BOARD OF SUPERVISORS COUNTY OF TULARE, STATE OF CALIFORNIA

IN THE MATTER OF AMENDING THE )  
POSITION ALLOCATION LISTING ) Resolution No. 2018-

Upon Motion of Supervisor (Name), Seconded by Supervisor (Name), the following was adopted by the Board of Supervisors, at an official meeting held March 6, 2018 by the following vote:

Ayes:  
Noes:  
Abstain:  
Absent:

Attest: Michael C. Spata  
County Administrative Officer/  
Clerk, Board of Supervisors

By: \_\_\_\_\_  
Deputy Clerk

Add, Delete, Reclassify or Amend	Effective Date	Previous Job Code	Previous Class Title	New Job Code	New Class Title	No. Of Pos	FTE	Grade	Position Number(s)	Dept ID	Job Cost Dist. No.
Add	3/18/18			000920	Procurement Technician II	3	3	651	000000	032-000	032-2160
Add	3/18/18			001620	Procurement Specialist II	2	2	093	000000	032-000	032-2160
Add	3/18/18			001630	Procurement Specialist III	1	1	094	000000	032-000	032-2160
Add	3/18/18			001600	Procurement Specialist Supervisor	1	1	092	000000	032-000	032-2160
Delete	5/7/18	075500	Buyer			2	2	794	00146, 00322	032-000	032-2160
Delete	5/7/18	038010	Purchasing Assistant I			2	2	279	03407	032-000	032-2160
Delete	5/7/18	088400	Purchasing Contracts Coordinator			1	1	545	02686	032-000	032-2160

Explanation: Add positions to Purchasing Allocation. Procurement Technician is a flexibly allocated class, department may fill at the I or II level. Procurement Specialist is a flexibly allocated class up to the II level. Department may hire at either the I or II level. Recruitments will be required for the Procurement Specialist III and the Procurement Specialist Supervisor positions.

Delete positions from Purchasing Allocation: Two (2) Buyer positions; Two (2) Purchasing Assistant I positions; and one (1) Purchasing Contracts Coordinator position. All positions to be deleted are filled. Human Resources & Development Department to initiate layoff process.