

PART I

HAWAII HEALTH SYSTEMS CORPORATION
STATE OF HAWAII

2.611

2.612

Class Specification
for the Class:

PROCUREMENT AND SUPPLY SPECIALIST SERIES
SR-20; SR-22
BU:13

Series Definition:

This series includes professional positions responsible for assuring the adequate provisioning of supplies, equipment, material and services to a State department or large agency with extensive purchasing activity and supply needs which substantially transcend normal office supplies and other standard State purchases. The work involves the responsibility for purchasing and, typically, for other functions such as storage, distribution and inventory management. Knowledge of State laws, rules, regulations, policies and practices in purchasing and, usually, in one or more other specialists in the provisioning of supplies, equipment and services to major departments or agencies are required as well as significant independent judgment and analytical ability in the conduct of the work.

The individual tasks involved in implementing activities within the various functions concerned with assuring the provision of adequate supplies and materials to maintain efficient operation of the assigned department or agency are substantially governed by specific and detailed procedures and safeguards to assure protection of the use of government property and funds and to assure the maximization of competition among vendors. Consequently, all positions concerned with such activities for a department are not, automatically, professional in nature nor characteristic of this series; nor can allocation to this series be based on assumptions or superficial similarities to criteria contained in this standard.

There are two major elements that must be considered:

- A. The work setting requirements and delegated authority given the position must show the potential for the requirement for and actual execution of professional work as described under the factors below:
 1. Evidence that the size, mission and nature of the organization to which the position is assigned is supportive of the requirement that professional judgment and substantial analysis are required to carry out the assigned functions. That is, supply needs are extensive and specialized and the organization's functions are dependent on

adequate provisioning on a timely basis, to assure continued effective functioning.

2. Management intent must show support of the use of a professional approach in the conduct of the work including providing the position with authority to implement and control provisioning of the organization in consideration of cost containment and other management concerns.
- B. Work responsibilities must show the application of professional judgment and analysis. The work performed must show that the individual is required to use judgment and analysis and substantial ingenuity and initiative in resolving problems in assigned areas and to support and promote management concerns (e.g., promoting cost containment through standardization, sequential purchasing, consolidated purchasing and other techniques).

Typically, positions of this nature supervise purchasing clerks and/or storekeepers as well as general clerical positions. Typically also, the majority of work time is related to resolving day-to-day problems of purchasing, stores receipt and storekeeping and related tasks. Therefore, for placement in this series, positions must show at least a substantial portion of time (25% or more) in performing professional work in one or more of the various specialties.

1. Purchasing: The following purchasing activities have been determined to be of a professional nature.
 - a. Developing complex specifications for the purchase of items requiring formal invitation for bid (IFB). (See the Purchasing Specialist Series Definition for a definition of “complex” specifications.
 - b. On a department-wide basis, serving as the identified “expert” in purchasing (as well as related supply functions) including responsibility for (1) development of purchasing policies and procedures and ensuring their implementation (where purchasing is decentralized ensuring their implementation must include monitoring of actions and delegated authority to approve/disapprove actions); and/or (2) advising line administrators in the development of contracts for the purchase of professional or research services involving the development of appropriate terms and conditions for such work, the review of scope of work and/or development of specifications for the conduct of the work, coordinating activities necessary for the formalization of appropriate contracts, their execution and advising on contract administration and termination problems.

2. Product Planning, Control and Quality Assurance and General Management: The following have been found to provide the opportunity for the performance of professional activity. How the work is performed conditions the determination of whether it is professional or not. There must be demonstration of the use of analysis, judgment and substantial ingenuity and initiative.

- a. Product Planning, Control and Quality Assurance:

Performing work which requires a knowledge of material, work sequences, schedules and the specialized needs of the program or operational areas and the application of analysis and judgment as evidenced by responsibility to:

1. Coordinate the testing of or to develop and conduct tests of new specialized items for use throughout the organization. Involves meeting with users, vendors and consultant experts on the product, determining pertinent factors required for testing, reviewing literature and/or consultation with experts or with vendors to determine pertinent testing methods or devising tests independently; developing data collection methods, coordinating user tests or conducting test personally; verifying results; analyzing ensuing data and consolidating findings. Coordination of such testing may or may not involve cost comparison studies among similar products or require the use of statistical methods to analyze data. However, such work does involve making formal reports and recommendations to a formal body established for the determination of the acceptability of products for statewide use and justifying determinations made to vendors, management and others as applicable.
2. Analyze usage of supplies/equipment to determine areas of high cost, meet with users to identify areas in which costs can be contained by consolidating or standardizing the variety of supplies/other material used, find alternative methods of operations so as to save on material needs, conduct research on alternative products requiring the use of quantitative methods for comparison purposes (e.g. life cycle costing, cost-benefit analysis), etc.
3. Delegated authority from management to review operational policies and procedures of line users to assure that use of existing supplies and equipment are maximized and that the most cost-effective types of supplies/equipment are used.

Includes advising on alternative products and promoting their use including educating users in cost implications, etc.

4. Conducting formal studies to determine costs of ownership (life cycle costing) or in-use costs to assist management in the determination of appropriate products for maximum effective use, where the work involves gathering a wide range of data from vendors, users, consultants and others, evaluating the validity of data, developing estimates for life of product, identifying cost-bearing factors and determining the extent to which they are applicable, the extent to which reliable data can be obtained about them, obtaining pertinent data, analyzing results and coming to cost conclusions, justifying results of the study to vendors, management or the central purchasing organization (DAGS) (i.e., in seeking exemption from price list purchases, to justify sole source or restricted bidding, and for other purposes). To be considered professional, such studies must take into consideration at least the following factors: (a) purchase price, (b) maintenance costs, (c) repair costs, (d) operating cost (when applicable), and (e) anticipated life expectancy of the desired product.
- b. General Management: Designation by management to participate in the overall management of the organization by
1. developing policies, and monitoring and overseeing their implementation by all units of the organization regarding purchasing, stores and other assigned functions; and
 2. participation in the general management of the organization by assignment to serve on problem-solving committees or to perform special troubleshooting or other investigations and responsibility to recommend alternatives for action to resolve problem situations. The work should involve or require the ability to collect and evaluate data and facts, determine the difference between inferences, conclusions and factual information, apply applicable laws, rules and regulations, if any, consider alternative solutions and recommend sound and practical solutions consistent with management objectives and concerns.

Two functions typically associated with provisioning of supplies do not, within current State line-department operations, provide an opportunity for professional work and thus are not a basis for allocation of a position to this series. These activities, and the reasons for their clerical/technical nature are as follows:

Storekeeping: Physical inventory taking, inventory recordkeeping and reporting, and related storekeeping activities in line departments in State government have not been found to require judgment and analysis of a professional nature. These areas require judgment based on experience and knowledge of established practices and procedures.

Property Control and Disposal: Because of the existence of strong and specific state policies and procedures, these areas were found to involve technical rather than professional problem-solving in line-departments.

PROCUREMENT AND SUPPLY SPECIALIST III

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Duties Summary:

Performs professional work in providing materials, equipment, supplies and services to a department or large agency; and performs other related duties as assigned.

Distinguishing Characteristics:

This class reflects the performance of professional work substantial amount of time (25% or more) in providing a department or large agency with supplies, materials, equipment and services. Professional work activities performed and the characteristics of the agency in which located must conform to the descriptions contained in the series definition. Two typical work situations exist:

- A. A position responsible for planning, directing and conducting varied activities required in the provision of goods, services, materials and equipment to a department or large agency including activities such as purchasing, storage and distribution, inventory management etc. The scope of work typically includes the direction of purchasing technicians, storekeepers, stores clerks and/or other technical, non-professional positions carrying out assigned functions.
- B. A position serving as the assistant to a procurement and supply specialist in charge of a procurement and supply program for a department or large agency in which work is so voluminous that full time professional assistance is required. The scope of work of the program is such that professional work requiring a substantial amount of time (25% or more) has been delegated to a position of this type, e.g., the development of complex specifications for formal bids (IFB), conducting cost studies of alternative products, product standardization and related special studies. While a position may also assist in the performance of related management duties associated with the direction of a procurement and supply program for the

agency such as the formulation and recommendation of policies or procedures, there must be clear demonstration that such management duties require the application of judgment and analysis as described in the Series Definition for this series.

In both situations, positions function independently with the supervisor consulted only in situations which are not precedent or which present unusual and/or sensitive problems. Technical decisions are normally not questioned and positions function with considerable delegated authority by management to implement and assure proper functioning of purchasing and related activities assigned.

Examples of Duties:

These examples are illustrative only and not all-inclusive. Further, this listing is not limited to professional tasks but includes examples of non-professional tasks commonly performed by positions in this and other classes and series. Since the allocation to this series is dependent on how the work is performed as well as the specific task performed, refer to the Series Definition for determination of those tasks which form the basis for allocation to this series and class.

Purchases a wide variety of goods and services for a department or large agency using formal and informal methods; conducts studies of requested products, working with users and writing complex specifications for scientific, technical and other complex products and equipment; reviews professional and/or research services contracts and advises users on all aspects of contract development including special terms and conditions and contract language; discusses, reviews trends and determines supply needs for the organization; conducts studies and advises users of alternatives; conducts studies of the standardization of products for cost-containment, lowering of storekeeping requirements; conducts life cycle or life use studies and advises users of alternative products; reviews operation procedures and policies of users and determines and identifies where operational changes can be reasonably made to utilize more cost-effective products; analyzes results of formal bids and determines or recommends award to lowest bid; supervises or provides instructions and coordinates taking inventory; supervises storekeeping activities; analyzes stores for cost-containment; participates in management studies for cost-containment in the organization relative to purchasing or equipment/supply usage and needs; supervises or advises on property disposal; may maintain inventory of real property; develops purchasing, stores and distribution and related policies for the organization and oversees their implementation; reviews purchasing actions and assures adherence to governing policies, laws, rules and regulations; assesses problem situations and make determinations outside of existing policies and standard procedures to resolve them where applicable; develops the budget and justification for assigned function; may participate in the development of the organization's overall budget by advising on projected costs of equipment, supplies etc. based on studies and knowledge and experience relative to market trends, manufacturers' changes and other factors; coordinates the testing of new products for

the organization by discussing factors of the product necessary to be tested, developing and/or assisting in developing data collection forms, methods and procedures, consolidating findings and making formal presentations to management and other users regarding the quality of products; may make cost comparison studies; maintains good relationships with a wide range of vendors, users and central agency (DAGS) staff; serves as liaison when central agency provides purchasing or other assistance and to expedite contracts approval and other requests; develops justification for sole source, restricted purchasing or exemptions for price list purchasing; consolidates purchasing requirements and negotiates purchase prices for items not requiring formal bidding; may control and report on user expenditures; may supervise the pre-audit of all purchase vouchers for a major organization; prepares reports and correspondence; supervises staff to include training, development, review of work and advising on difficult problem areas, resolving grievances and other personnel problems.

Knowledges and Abilities Required:

Knowledge of: Procurement and supply principles, methods and practices; applicable federal, State and local laws, regulations and standard; nature, content and applicability of reference material and other informational data required in the execution of assignments; preparation of specifications, requisitions, advertisements of bids and formal contracts; principles, procedures, techniques and practices in inventory management and property control; office and storekeeping practices and procedures; most positions require knowledge of supervisory principles and practices.

Ability to: Plan, schedule and organize procurement activities; secure necessary information to provide adequate specifications; encourage wide competition in bidding; initiate and maintain effective relationships with representative of other governmental agencies, subject-matter specialists, contractors, vendors and others; prepare clear and comprehensive reports, records and correspondence.

PROCUREMENT AND SUPPLY SPECIALIST IV

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Duties Summary:

Plans, organizes and conducts activities to assure the adequate provisioning of a department or large agency where the work is so voluminous as to require professional assistance; or develops policies and procedures on purchasing and related activities for a major department and monitors their implementation on a department-wide basis; and performs other related duties as assigned.

Distinguishing Characteristics:

This class reflects the performance of professional work a substantial amount of time (25% or more) in providing a large department or agency with supplies, materials, equipment and services. Professional work activities performed and the characteristics of the agency in which located must conform to the descriptions contained in the series definition.

This class reflects two major types of positions which may not be mutually exclusive:

- A. A position responsible for the performance of professional and supervisory work where the need for professional services is so extensive that the work of this position includes the supervision of a subordinate professional procurement and supply specialist in providing goods, services, materials, equipment and supplies for a department or large agency.
- B. A position concerned with the performance of professional work including responsibility for the development of policies and procedures for purchasing and related procurement and supply functions for a major department in which these functions are decentralized and which includes overseeing and monitoring conformance of actions to these, other legal requirements and good management practices and/or which includes advising on and coordinating contracts for the department for the purchase of goods and services. Scope of work includes responsibility for advising program administrators in all aspects of purchasing including the lease/rental of property, conducting feasibility and space studies for lease/rental of properties and negotiating for same, and delegated authority to approve/disapprove purchases and/or contracts consistent with cost considerations and propriety of actions.

In both situations, positions report to non-purchasing program administrators or general administrative officers and function with considerable independence in the development and implementation of new/innovative approaches to problems in their assigned functions. They also function with considerable delegated authority from management to implement and assure the proper functioning of purchasing and related activities assigned to them.

Examples of Duties:

The following examples are illustrative only and not all-inclusive. Further, this listing is not limited to professional tasks but includes examples of non-professional tasks commonly performed by positions in this and other classes and series. Since the allocation to this series is dependent on how the work is performed, as well as the specific tasks performed, refer to the Series Definition for determination of those tasks, which form the basis for allocation to this series and class.

- A. In addition performing the tasks listed under the specifications for Procurement and Supply Specialist III, positions at this level plan and supervise the work of one or more subordinate professional Procurement and Supply Specialists providing assistance in a specialty (e.g. the development of complex formal Invitation for Bid) or generally throughout the program.

- B. Develops and maintains department-wide policies and procedures for purchasing, inventory management, stores maintenance and related subjects; reviews purchasing on a pre- or post-audit basis and approves purchases relative to propriety of procedures and to ensure the most cost-effective purchase; encourages and promotes adherence to legal and policy requirements in purchasing and related functions; advises program managers and administrators at all levels of the department regarding a wide range of purchasing situations ranging from the purchase of supplies and equipment to purchases for professional and research services; conducts studies for the acquisition of added office space and makes recommendations regarding feasibility of purchase/lease/rental; negotiates leases and develops contracts as appropriate for the acquisition of space; advises or develops scope of work or specifications for the purchase of professional or research services and revises contracts to ensure protection of the department's interests as well as for conformance with policy and legal requirements; develops specifications for complex purchases for a variety of goods and services; provides cost information for budget development; prepares reports and correspondence; maintains good relationships with a wide range of vendors, users and central agency staff; maintains liaison with central agency staff in the processing of formal invitation for bids and other matters; keeps abreast of new products and technologies; may coordinate copying and telecommunications systems requests for the department; may coordinate auto registration and insurance for the department.

Knowledges and Abilities Required:

In addition to the knowledges and abilities required at the next lower level, this level requires:

Knowledge of: A thorough knowledge of the laws, regulations, procedures and practices governing procurement and supply functions and the expenditure of public funds; detailed knowledge of the nature and content of reference and other similar material required in the execution of the assignment; a good knowledge of the objectives and purposes of the agency's procurement and supply program, and of related administrative and technical activities; research methods and techniques; most positions require knowledge of supervisory principles and practices.

Ability to: Meet with and secure the cooperation of administrative and technical personnel of the agency, of other governmental agencies, and representatives of industrial and commercial concerns; to analyze varied data, determine significant elements, factors and considerations, and make constructive and comprehensive recommendations.

This is an amendment to the class specifications for the classes PROCUREMENT AND SUPPLY SPECIALIST III & IV approved on August 13, 1982.

This class is adopted from the State of Hawaii, relative to the transfer of classification and compensation jurisdiction to the Hawaii Health Systems Corporation, effective July 1, 1998, pursuant to Act 262, Session Laws of Hawaii, 1996.

APPROVED: _____
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