CONTRACTING AND PROCUREMENT SPECIALIST

OCCUPATIONAL INFORMATION
Contracting and Procurement Specialists develop policies to acquire or procure supplies, goods and/or services. Contracting and Procurement Specialists use a series of techniques to obtain proposals including formal advertising, sole source purchases, or competitive bidding. The work requires knowledge of policies and procedures for delivery orders, purchases, commercial supply sources and common business practices related to sales, prices, and discounts, units of measurement, deliveries, stocks, and shipments. Contracting and Procurement Specialists research and evaluate suppliers based on price, quality, selection, service, availability, support, reputation, and history. Contracting and Procurement Specialists confer with City agencies, other staff members, users, and vendors to identify the best solution for the goods and services requested.

Major Contracting and Procurement Functions

Requirements Determination. The contracting and procurement process begins with the determination of requirements needed to accomplish the mission of City agencies. The City agency is responsible for the initial determination that the requirements can or cannot be fulfilled from within the City government, for preparing preliminary specifications or work statements, recommending delivery requirements, and assuring the availability of funds.

The Office of Contracting and Procurement (OCP) Contracting and Procurement Specialists consult with the City agency to develop an overall Contracting and Procurement Plan (the “Plan”) designed to meet the agency’s goals, objectives, and requirements in the most economical, timely, effective, and efficient manner. The OCP provides assistance in developing acceptable specifications, work statements, and evaluation criteria; determines the method of procurement and contractual arrangement appropriate to the particular requirements; and conducts the contracting process. The Plan contemplates the entire procurement process from the inception of a program to completion of the contract. It may be simple or complex, depending on the circumstances of the particular requirement. It includes such fundamental considerations as funding, contracting method, contract type, source competence, number of sources, source selection, service or product delivery, City-furnished property, possible follow-on requirements, and contract administration. The Plan includes the means to measure accomplishments, evaluate risks, and consider contingencies as a program progresses. The Plan should also include market research and analysis and other considerations as necessary to achieve the program objective.

Contracting and Procurement Methods. Contracting and procurement is accomplished by two basic methods, formal advertising and negotiation, for acquiring services and products from the private sector. Formal advertising is the preferred method, however the law provides exceptions that permit negotiation in those situations where formal advertising is not appropriate. Formal advertising is used when the following conditions exist: definitive specifications are used; adequate competition is expected to be available; selection can be made on the basis of the best value to the City response; responsible bidder; and sufficient time exists to solicit, receive and evaluate bids, and determine the responsibility and responsiveness of the low bidder. Negotiation is used when formal advertising is not appropriate and there is justification under one or more of the statutory exceptions to formal advertising. The negotiation method provides for the City to discuss and explore with one or more vendors the soundness or reasonableness of their offer. Competition is obtained on every solicitation unless it is impracticable and sole source procurement is justified in writing.

Contracts. There are numerous types of contracts, which provide the flexibility needed to purchase the large variety and volume of supplies, services, construction, and other products and services required by the City, and to balance risks both to the City and to the contractor in the areas of cost, schedule, and
technical factors. Typical contract types include fixed-price, cost reimbursement, and special purpose contracts.

**Business Evaluation.** Before a contract is awarded, technical and business evaluations are conducted. The OCP consults with the City agency and other Office of the Chief Financial Officer staff to perform the technical and business evaluations, including but not limited to: (1) the responsiveness of the bid or offer to the solicitation; (2) evaluating the cost or price proposals; and (3) determining the responsibility of the contractor in terms of business operations and qualifications to perform the work.

**Contract Administration.** OCP contract administration consists of all the actions that the City must take with respect to the contractor until the material or service has been delivered, accepted, and paid for, and the contract withdrawn, closed out, or terminated. While the contractor has primary responsibility for the timely and satisfactory performance of a contract, the City monitors outstanding contracts to ensure satisfactory progress, to assure compliance with the terms and conditions of the contract, and to identify problems that threaten performance.

Typical OCP contract administration functions consist of: conduct post-award conferences; assure timely submission of required reports; determine allowability of costs and approve or disapprove contractor requests for payment; review and analyze proposed subcontracts and consent, or withhold consent, to the placement of subcontracts; perform cost or price analysis on proposals that involve contract changes, indirect rate agreements, and settlements; negotiate contract modifications, terms and costs of changes, forward pricing proposals, provisioning orders, unpriced orders, final overhead rates, and settlements; recommend acceptance or rejection of waivers and/or deviations; monitor contractor's financial condition, compliance with labor and industrial relations matters, use of City property, and small and minority business mandatory subcontracting programs; determine contractor compliance with Cost Accounting Standards and Disclosure Statements; issue cure or show cause notices to correct severe performance deficiencies; analyze claims and negotiate final settlements; prepare findings of fact and issue decisions under the Disputes clause; and close out contracts, assuring delivery of the contract end items and inclusion of final reports and clearances.

**Contract Termination.** Contract termination by the City occurs for a variety of reasons, such as technological advances in the state-of-the-art, changes in strategic planning, budget and funding limitations, or failure of the contractor to perform. City contracts provide for termination prior to completion of the contract for either: (a) convenience of the City, or (b) default of the contractor. Terminations may be either partial or complete, and may occur at any time during performance, even though the contractor is performing properly.

**DEFINITION OF CLASS**

The Contracting and Procurement Specialist class includes positions that involve managing, supervising, performing, or developing policies for professional work to acquire or procure supplies, services, and construction, or research and development by purchase, rental, or lease through delivery orders, purchase procedures, formal advertising or negotiation procedures; the evaluation of contract price proposals; and the administration or termination and close out of contracts. The work requires knowledge of policies and procedures for delivery orders, purchases, commercial supply sources and common business practices related to sales, prices, and discounts, units of measurement, deliveries, stocks, and shipments.
Key duties and responsibilities of Contracting and Procurement Specialists include (1) soliciting, evaluating, negotiating, and awarding contracts with commercial organizations, educational institutions, nonprofit organizations, and State or local governments for furnishing products, services, construction or research and development to the City of Detroit; (2) administering contracts by assuring compliance with the terms and conditions of contracts, including resolution of problems concerning the obligations of the parties; (3) terminating contracts by analyzing, negotiating, and settling claims and proposals; (4) analyzing and evaluating cost or price proposals and accounting systems data; (5) planning, establishing, or reviewing contracts, programs, policies, or procedures; (6) formulating and administering policies and procedures to insure achievement of City socioeconomic goals, such as those affecting small business, labor surplus areas, and disadvantaged business firms; (7) developing acquisition strategies and directing or managing procurements; and (8) providing staff advisory services in one or more of the specializations in this occupation.

**DUTIES AND RESPONSIBILITIES** (Illustrative)
The duties specified below are representative of the range of duties assigned to this job class and are not intended to be an inclusive list.

- Formulates procedures, policies, and guidelines for bid proposals and procurement of goods and services, including preparing estimates for use in selecting vendors or subcontractors
- Participates in researching and writing specifications and preparing time, cost, material, and labor estimates for items to be purchased
- Purchases the highest quality merchandise at the lowest possible price and in correct amounts
- Reviews catalogs, industry periodicals, directories, trade journals, and Internet sites, and consults with other department personnel to locate and forecast necessary goods and services, requirements, inventory levels, and pricing
- Develops acquisition strategies and directs or manages procurements
- Analyzes price proposals, financial reports, and other data and information to determine reasonable prices
- Investigates sources of supply for certain commodities and obtains information on new products to meet designated needs
- Reviews requisitions for accuracy of description of products and services; makes referral to departmental specifications for acceptance or modifies departmental specifications and award criteria
- Approves requests for proposals, quotations, and the issuance of formal purchase requisitions
- Confers with engineers, architects, owners, contractors, and subcontractors on changes and adjustments to cost estimates
- Consults with clients, vendors, personnel in other departments, or construction foremen to discuss and formulate estimates and resolve issues
- Negotiates, renegotiates, and administers contracts with suppliers, vendors, and other representatives
- Terminates contracts by analyzing, negotiating, and settling claims and proposals
- Maintains and reviews computerized or manual records of items purchased, costs, deliveries, product performance, and inventories
- Evaluates and monitors contract performance to ensure compliance with contractual obligations and to determine need for changes
- Monitors changes affecting supply and demand, tracking market conditions, price trends, or futures markets
- Studies sales records and inventory levels of current stock to develop strategic purchasing programs that facilitate Contracting and Procurement Specialist access to supplies
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- Analyzes blueprints and other documentation to prepare time, cost, materials, and labor estimates
- Prepares estimates for use in selecting vendors or subcontractors
- Interviews vendors and visit suppliers’ plants and distribution centers to examine and learn about products, services, and prices
- Prepares cost and expenditure statements and other necessary documentation at regular intervals for the duration of the project
- Sets up cost monitoring and reporting systems and procedures. Reports should include assessment of cost effectiveness of products, projects, or services, tracking actual costs relative to bids as the project develops, and develop progress reports
- Provides staff advisory services
- Prepares purchase orders, solicits bid proposals, and reviews requisitions for goods and services
- Monitors and follows applicable laws and regulations
- Prepares estimates used by management for purposes such as planning, organizing, and scheduling work
- Researches, analyzes, and evaluates suppliers based on price, quality, selection, service, support, availability, reliability, production and distribution capabilities, and the supplier's reputation and history
- Writes and reviews product specifications, maintaining a working technical knowledge of the goods or services to be purchased
- Works with bidders, contractors, and other vendors to resolve difficulties which arise during and after the procurement and/or sales process
- Monitors shipments to ensure that goods come in on time and resolve problems related to undelivered goods
- Monitors expenditures to ensure all purchasing is conducted in compliance with City approved policies and procedures
- Arranges the payment of duty and freight charges
- Performs special projects and other duties as assigned

KNOWLEDGE, SKILLS, AND ABILITIES

The knowledge, skill, and ability of a Contracting and Procurement Specialist increases with the level of responsibility and experience.

At the entry-level, knowledge requirements might include basic professional knowledge of:
- Principles, guidelines, terminology, and processes of contracting and procuring goods and services
- Methods of competitive bidding and the sources of supply
- Technical knowledge of a variety of commodities and services for an assigned specialty area
- Processes used in competitive negotiations for specific services
- Report writing techniques to present factual information clearly
- Current markets and trade conditions
- Regulations and procedures of state governmental purchasing, leasing and/or selling (includes real estate)
- Business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources
- Arithmetic practices used in business (e.g. discounts and warranties) sufficient to compare prices on recurring types of procurements
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- Algebra, geometry, calculus, statistics, and their applications
- Practical application of engineering science and technology. This includes applying principles, techniques, procedures, and equipment to the design and production of various goods and services
- Structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar
- Enterprise resource planning systems for finance, budget, general ledger, human resources, and other management systems and software programs

At the intermediate level, knowledge requirements might include detailed, intensive knowledge of:
- Commonly used contracting methods and contract types relating to the performance of pre-award, post-award, and/or contract price/cost analysis functions when the contract actions are well defined and well presented
- Familiarity with business practices and market conditions applicable to program and technical requirements sufficient to evaluate bid responsiveness, contractor responsibility, and contractor performance
- Specialized areas to analyze difficult contracting issues and identify alternative courses of action, modify standard contracting procedures and terms to satisfy specialized requirements, and solve a variety of contracting problems, including those requiring significant departures from previous approaches
- Arithmetic practices used in business (e.g. discounts and warranties) sufficient to compare prices on recurring types of procurements
- Algebra, geometry, calculus, statistics, and their applications
- Practical application of engineering science and technology. This includes applying principles, techniques, procedures, and equipment to the design and production of various goods and services
- Enterprise resource planning systems for finance, budget, general ledger, human resources, and other management systems and software programs

At the advanced level, knowledge requirements might include comprehensive knowledge of:
- Contracting methods and contract types to plan and carry out long-term pre-award and/or post-award procurement actions
- Procurement principles and technical or program requirements to plan and manage or make decisions or recommendations that significantly affect the content, interpretation, or development of complex, long-range, or interrelated agency policies or programs concerning the management of procurement matters
- The procurement functional area sufficient to apply experimental theories and new developments to problems not susceptible to treatment by accepted methods
- Business strategy and program or technical requirements sufficient to perform or direct in-depth evaluations of the financial and technical capabilities, or the performance, of the contractor
- Regulations and procedures of state governmental purchasing, leasing, and/or selling (includes real estate)
- Methods of competitive bidding and the sources of supply
- Arithmetic practices used in business (e.g. discounts and warranties) sufficient to compare prices on recurring types of procurements
CONTRACTING AND PROCUREMENT SPECIALIST

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Skill in:
- Use of personal computers
- Use of Microsoft Office (e.g. Word, Excel, Access, PowerPoint) and other office suite software packages
- Use of Excel (e.g. Pivot Tables, Vlookup, Hlookup, charts, tables) and other financial management software packages functionality
- Use of large, complex, multi-departmental financial systems, and demonstrate the knowledge required to interpret resulting financial and accounting reports, summaries and budgets
- Interpersonal skills to interact effectively with personal contacts in a business-like, customer service oriented manner, and maintain favorable public relations
- Presenting concise financial information to a variety of audiences
- Understanding the implications of new information for both current and future problem-solving and decision-making
- Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems
- Selecting and using training/instructional methods and procedures appropriate for the situation when learning or teaching new things
- Using mathematics to solve problems
- Understanding written sentences and paragraphs in work-related documents
- Talking to others to convey information effectively
- Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions
- Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times
- Considering the relative costs and benefits of potential actions to choose the most appropriate one
- Motivating, developing, and directing people as they work, identifying the best people for the job
- Managing one’s own time and the time of others

Ability to:
- Collect, quickly interpret, and analyze information from a variety of sources, apply criteria, draw conclusions, and develop recommendations, guidelines, and policies
- Maintain records and prepare reports and correspondence related to the work
- Plan, set priorities, and organize numerous work assignments to meet tight and often conflicting deadlines
- Read and understand information and ideas presented in writing
- Work tactfully and effectively with employees, supervisors and managers, and with elected and appointed officials and senior staff in assigned departments and agencies
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- Develop cost-benefit and business case analyses by consolidating information, identifying relevant data, and making logical assumptions to provide insight and recommendations with minimal errors regarding cost savings, long-term cost, best supplier, and capability
- Participate in decision-making sessions, provide guidance, and advise a number of department leaders on legal and regulatory requirements, purchasing policies, the interpretation of data, potential roadblocks, and project timeline
- Evaluate goods and their substitutes, and weigh price, quality, and other factors affecting purchasing decisions
- Negotiate for the best goods and services for the lowest price and best terms
- Apply general rules to specific problems to produce answers that make sense
- Identify and understand the speech of another person
- Listen and understand information and ideas presented through spoken words and sentences
- Communicate information and ideas in speaking so others will understand
- Make mathematical computations to determine selling price, discounts, percentages, volumes, weights and measures, reorder quantities, and related statistics
- Work as part of a team

SUPERVISORY CONTROLS
The level and nature of the supervision given to a Contracting and Procurement Specialist will vary depending on their experience and level, i.e. whether they are at the basic, intermediate, or advanced professional levels. Supervision may be close up to cursory.

At the basic-level, the Contracting and Procurement Specialist works as instructed and consults with the supervisor, higher-grade Contracting and Procurement Specialist professionals, higher-grade financial professionals, or other designated authority on matters not specifically covered in the original instructions. All work is closely controlled either through the structured nature of the work itself, through review in-progress, or through review of completed work for accuracy, adequacy, and adherence to instructions and established procedures.

At the intermediate level, the supervisor, higher-grade Contracting professionals, higher-grade financial professionals, or other designated authority may provide standing instructions on recurring assignments by indicating what is to be done, applicable policies and procedures to follow, quality and quantity of work expected, deadlines, and priority of assignments.

At the advanced-level, the Contracting and Procurement Specialist takes initiative to perform recurring or individual assignments. The Contracting and Procurement Specialist also resolves recurring problems independently (e.g. investigates recurring discrepancies in procurement documents, obtains missing information from originators or explains procedural requirements). The Contracting and Procurement Specialist refers situations not covered by instructions or precedents to the supervisor for decision or help. The supervisor evaluates the accuracy and adequacy of completed work and methods used through indicators, such as the frequency and nature of problems resulting from errors in processing, problems with responding to inquiries or requests, the nature and frequency of complaints from serviced employees or others and thorough a review of reports or other controls built into the system.

GUIDELINES
Extensive guidelines exist for Contracting and Procurement Specialists. The differences in levels is determined by the judgment required to identify which guidelines to use, how to interpret the guidelines, and the ability to make judgments with missing, incomplete, or conflicting information. Guidelines exist
in the form of agency regulations, legislation, procedures, manuals, and requirements; local, state, and federal rules and regulations; budget guidelines; appropriations language from the City of Detroit, Wayne County, the State of Michigan, the Federal government, grants, and agencies; and tax regulation. The City of Detroit Charter and City of Detroit Ordinances also offers guidelines for how the City should be run, therefore the Contracting and Procurement Specialist must ensure financial compliance to the Charter and Ordinance in addition to compliance to General Accepted Accounting Principles (GAAP), IRS, Treasury Department, Office of Budget, and other accounting standard bodies. Other guidelines may include previous audits, precedent cases, and appropriations language. However, judgment is required to determine applicability of these other guidelines.

COMPLEXITY
The complexity of the work derives from the nature, number, variety, and intricacy of tasks, steps, processes, or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work. Work complexity is further driven by the policies and procedures that guide the work or from communications with City employees unfamiliar with contracting and procurement, and ability to translate procurement data into reports easily understood by people with and without a related background.

SCOPE & EFFECT
The scope and effect of the work centers on support to the supervisor, higher-grade Contracting professionals, financial professionals, or other designated authority in the preparation and reconciliation of accounting reports, analysis, interpretation, and systems management. The accuracy and timeliness of the work impact on the reliability of the daily output of the individual or office and periodic accounting and financial reports and statements.

PERSONAL CONTACTS
At the entry level, contacts are usually with employees in the immediate organizational unit or in closely related support units. Contacts are with employees outside the organization or with members of the general public in very highly structured situations.

At the intermediate or advanced levels, contacts are with contractors, vendors, business owners, elected officials, the general public and other individuals that have an interest in doing business with the City of Detroit. Contacts include Executives, officials, managers, professionals, and/or taxpayers including corporation officials, and employees of other agencies and outside organizations and businesses.

PURPOSE OF CONTACTS
At the entry-level the purpose of contacts is to plan, arrange, acquire, coordinate, or advise on work efforts and/or arrange for interviews and meetings to obtain information; and, as required, to obtain data to verify questionable items. Though differences of opinion may exist, the persons contacted are usually working toward a common goal and generally are cooperative. At the intermediate and advanced levels, the purpose of contacts is to influence, motivate, and persuade program managers and other officials in positions of decision-making authority with widely differing goals and interests to follow a recommended course of action consistent with established budget/financial management policies, objectives, or regulations.

PHYSICAL DEMANDS
The work is characterized as sedentary. Typically Contracting and Procurement Specialists sit comfortably to do their work, interspersed by brief periods of walking, standing, bending, carrying of
papers and books, and extended periods requiring the use of computer terminals to accomplish work objectives.

WORK ENVIRONMENT
Work is performed in a comfortable office environment, which is appropriately lighted, heated and cooled. The work environment contains no significant hazards. Some work may require walking and standing in conjunction with travel to and attendance at meetings and conferences away from the work site. The Contracting and Procurement Specialist may encounter individuals that are upset.

During extended periods each year, Contracting and Procurement Specialists may be required to work considerable overtime.

MINIMUM QUALIFICATIONS
These minimum qualifications establish the education, training, experience, special skills, and/or license(s), which are required for employment in the classification. Note: additional qualifications (i.e., special conditions) may apply to a particular position.

Education
For all Contracting and Procurement Specialists it is a requirement to have completed bachelor's degree from an accredited college or university, with major course of work in business or public administration, finance, purchasing or a closely related field.

Contracting and Procurement Specialists with a Master in Business Administration, Master in Accounting, or other appropriate and related courses of study meet the minimum experience required for Contracting and Procurement Specialist II.

Experience
For entry into the Contracting and Procurement Specialist position no work experience is required, however the minimum education requirements must be met. Contracting and Procurement Specialist must demonstrate proficiency with integrated word processing and spreadsheet functions.

For selection, appointment to a Contracting and Procurement Specialist level II or higher, in addition to the minimum education requirements, more progressive levels of experience are required based on the following:

Contracting and Procurement Specialist II – at least two (2) years of experience
Contracting and Procurement Specialist III – at least three (3) years of experience
Contracting and Procurement Specialist IV – at least four (4) years of experience

License / Certificates
Possession of a Certified Professional Public Buyer (CPPB) and/or Certified Purchasing Manager (CPM) may be substituted for one (1) year of Contracting and Procurement Specialist II experience. Possession of a CPPB and/or CPM is preferred, but not required. There may be requirements for some positions that Contracting and Procurement Specialists have the CPPB and/or CPM.

Equivalency
Equivalent combinations of education and experience that provide the required knowledge, skills, and abilities will be evaluated on an individual basis.
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WRITTEN TEST REQUIREMENTS
Applicants may be required to illustrate proficiency in the use of software packages such as the Microsoft Office Suite including Word and Excel. Applicants may be required to take written tests to illustrate proficiency in other skill sets as may be determined based on the duties and responsibilities to be performed. These written tests might include mathematical skills and writing skills, including grammar and reading comprehension.

BACKGROUND AND OTHER CHECKS
Applicants may be subject to background, criminal, and credit checks.

POSITION TITLES
There are four positions in the Contracting and Procurement Specialist job class specification:

Contracting and Procurement Specialist I
This is the entry level. As a trainee, the Contracting and Procurement Specialist carries out a range of professional budget assignments while learning the methods of the work.

Contracting and Procurement Specialist II
This is the intermediate level. The Contracting and Procurement Specialist performs an expanding range of professional assignments in a developing capacity.

Contracting and Procurement Specialist III
This is the experienced level. The Contracting and Procurement Specialist performs a full range of professional assignments. Considerable independent judgment is used to make decisions in carrying out assignments that have significant impact on services or programs. Guidelines may be available, but require adaptation or interpretation to determine appropriate courses of action.

Contracting and Procurement Specialist IV
This is the advanced level. The Contracting and Procurement Specialist may function as a lead contracting and procurement specialist. At this level, Contracting and Procurement Specialists are responsible for overseeing the work assignments of other professionals or have regular assignments, which have been recognized by Civil Service as having significantly greater complexity than those assigned at the experienced level.

Based on the program functional area, parenthetical titling may be used when special subject matter knowledge of a specific functional area is required.

PROBATIONARY PERIOD
Individuals appointed to a position in this class will be required to serve a probationary period of six months with the possibility of a six-month extension for a total of twelve months. If promoted to a position in this class, an individual will be required to serve a probationary period of six months. Performance will be carefully evaluated during the probationary period. Continued employment in this class will be contingent upon successful completion of the probationary period.

CODE DESIGNATIONS
Class Code: 13-1020-00
EEO Code: 2
Date Established: 03/10/2015