

STATE OF OHIO (DAS) CLASSIFICATION SPECIFICATION	<b><u>CLASSIFICATION SERIES</u></b> Sourcing	<b><u>SERIES NUMBER</u></b> 6451
	<b><u>MAJOR AGENCIES</u></b> All Agencies	<b><u>EFFECTIVE</u></b> DRAFT

**SERIES PURPOSE**

The purpose of the sourcing occupation is to analyze agency's need & plan, find, evaluate, & contract with suppliers of goods & services, & ensure supplier performance.

**BI** – Business Intelligence reporting module of Ohio Administrative Knowledge System

**CRP** – Community Rehabilitation Program

**CTV** – Complaint to Vendor

**DAS** – Ohio Department of Administrative Services

**ERP** – Enterprise Resource Planning system

**FIN** – Financials module of Ohio Administrative Knowledge System

**GDC** – General Distribution Contracts

**LDC** – Limited Distribution Contracts

**MBE/EDGE** – Minority Business Enterprise/Encouraging Diversity, Growth & Equity

**OAKS** – Ohio Administrative Knowledge System

**OBM** – Ohio Office of Budget & Management

**OPI** – Ohio Penal Industries

**OOD** – Opportunities for Ohioans with Disabilities

**OSS** – Ohio Office of Shared Services

**PO** – Purchase Order

**Sourcing Lifecycle** – identifying need, developing specifications, identifying options, selecting suppliers, establishing contracts, & monitoring performance

**UNSPSC** – United Nations Standard Products & Services Code

Job duty, knowledge, skill, & ability statements at a lower-level are understood to be able to be performed at any higher level.

<b><u>JOB TITLE</u></b> Sourcing Associate	<b><u>JOB CODE</u></b> 64511	<b><u>PAY GRADE</u></b>	<b><u>EFFECTIVE</u></b> DRAFT
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**CLASS CONCEPT**

The entry level class works under immediate supervision & requires some knowledge of sourcing lifecycle in order to support agency's sourcing function by soliciting quotes, placing orders, & tracking order status.

<b><u>JOB TITLE</u></b> Sourcing Analyst	<b><u>JOB CODE</u></b> 64512	<b><u>PAY GRADE</u></b>	<b><u>EFFECTIVE</u></b> DRAFT
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**CLASS CONCEPT**

The first full performance level class works under general supervision & requires considerable knowledge of sourcing lifecycle in order to solicit & evaluate proposals, make recommendations & monitor supplier performance for a range of routine, established, customary requirements.

**JOB TITLE**

Senior Sourcing Analyst

**JOB CODE**

64513

**PAY GRADE**

**EFFECTIVE**

DRAFT

**CLASS CONCEPT**

The second full performance level class works under general supervision & requires considerable knowledge of sourcing lifecycle in order to solicit & evaluate proposals, make recommendations & monitor supplier performance where the need is not customary & the specifications must be developed where none exist.

**JOB TITLE**

Sourcing Planner

**JOB CODE**

64514

**PAY GRADE**

**EFFECTIVE**

DRAFT

**CLASS CONCEPT**

The advanced level class works under direction & requires thorough knowledge of sourcing lifecycle in order to independently or as a lead worker (i.e., provide work direction & training) research, evaluate & plan a comprehensive portfolio of contracts & purchasing based on past performance, future needs & strategic direction.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Sourcing Associate	64511	14	DRAFT	

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

1. Supports agency's sourcing function by soliciting quotes, placing orders, & tracking order status:
  - Comparison shops in ERP electronic catalog shopping, retail outlets, &/or against established state contracts
  - Compares prices, specifications, availability, & delivery dates to determine best fit & best price among potential suppliers
  - Verifies shipments, reconciles with orders, & follows up where needed
  - Contacts suppliers to schedule or expedite deliveries & to resolve shortages, missed or late deliveries, &/or other problems
  - Distributes quotes to requestor
  - Determines if supplier has a Finding for Recovery or is listed on the federal system for award management (e.g., checks website, prints & documents results)
  - Determines if chosen supplier is in ERP system (e.g., OAKS), & where needed coordinates vendor registration
  - Sends supplier W-9 Packet with vendor forms & tax information request
  - Places &/or corrects orders against mandatory use contracts (e.g., OPI, GDC, LDC, agency contracts)
  - Refers supplier to OSS to establish OAKS self-service & training
  
2. Creates &/or processes requisitions & purchase orders following established contract provisions:
  - Enters &/or corrects requisitions, & follows up where needed
  - Dispatches &/or corrects purchase orders, tracks status, & follows up where needed
  - Purchases goods & services with payment card
  - Contacts supplier by phone, online, or in person
  - Provides payment card information & obtains receipt
  - Completes &/or corrects payment card logs & routes for approval & payment according to agency procedures
  
3. Validates purchase requests:
  - Determines proper UNSPSC code
  - Follows up with requestor & supplier where needed
  - Corrects minor issues where needed, & routes purchase requests according to agency procedures
  - Determines proper financial account codes
  - Determines if established inventory levels are met
  - Validates mandatory use compliance according to agency procedures
  
4. Performs administrative functions:
  - Responds to requestor & supplier inquiries regarding status
  - Maintains sourcing files & validates for completeness according to agency standards & procedures
  - Prepares predefined administrative reports
  - Obtains asset profile ID from ERP system (e.g., OAKS)

**MAJOR WORKER CHARACTERISTICS**

Knowledge of office practices & procedures; sourcing principles; state & agency sourcing policies, procedures & regulations\*; ERP systems\* (e.g., OAKS FIN). Skill in operation of calculator; operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting\*. Ability to deal with problems involving several variables within familiar context; sort items into categories according to established method; maintain accurate records; calculate fractions, decimals & percentages; gather, collate & classify information about data, people or things; answer routine telephone inquiries from vendors &/or internal agency customers.

(\*)Developed after employment.

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

12 mos. exp. or 12 mos. trg. in purchasing/procurement/sourcing.

-Or completion of 1 yr. technical certificate in logistics, supply chain management, strategic procurement or other sourcing related subject.

-Or completion of short term certificate in logistics, supply chain management, strategic procurement or other sourcing related subject; 6 mos. exp. or 6 mos. trg. in purchasing/procurement/sourcing.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Not applicable.

**UNUSUAL WORKING CONDITIONS**

May require travel; may be required to work long or unusual hours during peak operational periods.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Sourcing Analyst	64512	14	DRAFT	

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

1. Solicits & evaluates proposals, makes recommendations & monitors supplier performance for a range of routine, established, customary requirements:
  - Receives & opens formal bids & proposals in accordance with established procedures
  - Arranges delivery of samples & submissions from potential suppliers to evaluators
  - Interviews vendors, checks references, &/or visits suppliers' plants & distribution centers to examine, learn about, & evaluate products, services, prices, performance, & capabilities
  - Conducts routine evaluation process of multiple samples & submissions from potential suppliers
  - Evaluates suppliers based on price, quality, selection, service, support, availability, reliability, production & distribution capabilities, & the supplier's reputation & history
  - Compiles information for Release & Permit &/or Controlling Board review & approval
  - Responds to follow-up requests from DAS & OBM to assist in disposition
  - Tracks status & follows up where needed
  - Works with requestor to establish specifications where products or services have multiple attributes that must satisfy a range of routine, established, customary requirements
  - Examines prepared description/specification of the need from program area & analyzes the need to determine proper level of detail is provided to be able to source good or service
  - Analyzes price proposals, financial reports, & other data & information to determine reasonable prices for expected scope, & to balance specifications, projected cost, & market availability to scope best fit
  - Verifies that goods & services meet specifications
  - Initiates vendor performance resolution
  - Researches & resolves routine customer & supplier disputes where parties do not agree regarding order status, changes, or cancellations
  - Creates routine requests for proposals for response by potential suppliers
  - Coordinates with requestor according to agency procedures to initiate formal CTV
  - Works with requestor to understand & scope need, including time & cost constraints of procurement engagement & other baseline expectations
  
2. Reviews, distributes & monitors requisitions, purchase orders & contracts:
  - Makes recommendations concerning contract proposals & contract amendment proposals according to agency procedures
  - Tracks contract status, controls contract versioning, & follows up where parties are unresponsive
  - Issues purchase orders for transactions outside of automated ERP systems
  - Distributes contracts & amendments to requestor & supplier
  - Obtains & applies proper financial codes (e.g., for split & proportional funding)
  
3. Identifies potential sources for goods & services:
  - Provides mandatory use & compliance review that requires subjective interpretation &/or application (e.g., MBE/EDGE, OPI, OOD, CRP, OSS)
  - Reviews catalogs, industry periodicals, directories, trade journals, & Internet sites, & consults with other department personnel to locate source options for goods & services
  - Customizes terms & conditions to fit specific needs & specifications
  - Creates supplier evaluation methods based on specifications fit, price, quality, selection, service, support, availability, reliability, production & distribution capabilities, & the supplier's reputation & history
  - Posts & distributes opportunities to potential suppliers according to policies & procedures
  - Coordinates responses to solicitation questions with requestor & legal counsel
  - Coordinates travel arrangements including flights, hotels, & ground transportation
  - Researches flight or hotel availability (e.g., determines the best available price that meets traveler & agency needs & requirements)

### **MAJOR WORKER CHARACTERISTICS**

Knowledge of public relations\*; sourcing principles; state & agency sourcing policies, procedures & regulations\*, ERP systems\* (e.g., OAKS FIN). Skill in operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting\*. Ability to define problems, collect data, establish facts & draw valid conclusions; gather, collate & classify information according to established method; calculate fractions, decimals & percentages; write routine business correspondence & reports following standard procedures; identify noncompliance & formulate response; give verbal instructions associated with sourcing procedures; develop & maintain good rapport with internal agency customers & vendors.

(\*)Developed after employment.

### **MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

Completion of associate core program in public or business administration, purchasing/procurement, materials management, contracting, acquisition management, logistics, strategic procurement, purchasing management, supply chain management or other sourcing related field.

-Or 18 mos. exp. or 18 mos. trg. in purchasing/procurement/sourcing.

-Or 6 mos. exp. as Sourcing Associate, 64511.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

### **TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Not applicable.

### **UNUSUAL WORKING CONDITIONS**

May require travel; may be required to work long or unusual hours during peak operational periods.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Senior Sourcing Analyst	64513	14	DRAFT	

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

1. Solicits & evaluates proposals, makes recommendations & monitors supplier performance where the need is not customary & the specifications must be developed where none exist (e.g., construction, intellectual property agreements, third-party managed services, solutions-based proposals):
  - Works with requestor &/or subject matter experts to establish specifications where products or services have multiple complex attributes & multiple deliverables
  - Designs & coordinates supplier prequalification tools & methods
  - Drafts complex analysis results & awards recommendation with rationale
  - Establishes acceptance & payment expectations & schedule for contracts with multiple deliverables &/or multiple phases
  - Coordinates with requestor & supplier to resolve cost overrun issues
  
2. Researches, analyzes, & makes recommendations regarding requisitions, purchase orders & contracts:
  - Evaluates & makes recommendations concerning proposed exceptions to terms or scope & proposed improvements over what was requested
  - Participates in contract negotiations with legal office, requestor & supplier
  - Provides market research & evaluation of balancing interests to aid in settling contract agreement
  - Establishes project plan pacing & scope
  - Identifies, contracts with, &/or works with subject matter experts to properly document need, & project timeline for developing specifications, risks, market strategy, & letting & evaluating opportunity
  - Determines cost projections & projected spending burn rate & sources for use in cost/benefit analysis, project budget tracking, allotment planning, & acceptance/payment modeling
  - Assesses projections with requestor & fiscal office
  - Recommends policies, procedures & improvements for sourcing practices
  
3. Designs & coordinates potential sources for goods & services:
  - Designs sourcing requirements across multiple preference programs &/or subcontractor preference programs
  - Conducts pre-proposal market interviews
  - Designs & coordinates competitive request for information processes, evaluates responses & formulates best approach to fit needs & constraints
  - Establishes vendor qualification & performance mechanisms (e.g., prime & subcontractor, prequalification, performance measures, deliverable acceptance) based upon market understanding & capability
  - Compares similarly-situated procurements of other jurisdictions (e.g., contacts other states & political jurisdictions; conducts interviews & collects information; evaluates similar proposals of other jurisdictions)

**MAJOR WORKER CHARACTERISTICS**

Knowledge of sourcing principles; state & agency sourcing policies, procedures & regulations\*; public relations; contracts; ERP systems\* (e.g., OAKS FIN). Skill in operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting\*. Ability to define problems, collect data, establish facts & draw valid conclusions; understand technical manuals & verbal instructions associated with sourcing procedures; use statistical analysis; proofread technical specifications, recognize errors & make corrections; identify noncompliance & formulate response; gather, collate & classify information about data, people or things; write business correspondence or communications reflecting sourcing procedures; develop & maintain good rapport with internal agency customers & vendors.

(\*)Developed after employment.

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

Completion of undergraduate core program in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 6 mos. exp. or 6 mos. trg. in purchasing/procurement/sourcing.

-Or 30 mos. exp. or 30 mos. trg. in purchasing/procurement/sourcing.

-Or 12 mos. exp. as Sourcing Analyst, 64512.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Not applicable.

**UNUSUAL WORKING CONDITIONS**

May require travel; may be required to work long or unusual hours during peak operational periods.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Sourcing Planner	64514	14	DRAFT	

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

1. Independently or as lead worker (i.e., provides work direction & training) researches, evaluates & plans a comprehensive portfolio of contracts & purchasing based on past performance, future needs & strategic direction:
  - Reviews records of items purchased, costs, deliveries, product performance, & inventories, & improves specifications where needed
  - Conducts supply chain market research
  - Monitors & reviews use, history & trending of individual suppliers, & identifies where incumbent suppliers should be replaced or competed across portfolio of contracts
  - Tracks & reviews performance & performance lapses across portfolio of contracts
  - Identifies options for repeated performance lapses of particular suppliers holding multiple contracts
  - Tracks & reviews CTV, outcomes & suits across portfolio of contracts
  - Records contract terms & renewal options
  - Surveys market conditions, historical spending trends, price trends
  - Monitors & responds to changes affecting supply & demand
  - Reviews sourcing history (e.g., travel, preference programs, information technology) & forecasts trends to identify opportunities to consolidate buying power & negotiate more favorable terms & costs
  
2. Builds contract portfolio across multiple program areas:
  - Confirms portfolio meets the needs of program areas
  - Contacts other government offices with similar needs to standardize specifications, combines buying power & schedules, & establishes cooperative agreements across contract portfolio
  - Determines cost projections across contract portfolio, identifies cost savings & avoidance targets, & establishes cost control & reduction plan
  - Evaluates use records & inventory levels & trending of stock to develop strategic purchasing programs that facilitate improved supply chain delivery & cost reduction
  
3. Monitors portfolio & makes adjustments in conformance with policy changes (e.g., federal, state, agency):
  - Tracks & reviews use of terms, modification of terms, & exceptions to terms
  - Identifies plans & evaluates term improvements with legal counsel
  - Plans & improves planned use of preference programs across contract portfolio in accordance with policies & procedures factoring need, availability, performance, & success
  - Identifies replacement approaches to preferences where needed
  - Coordinates findings & supplier experiences with DAS & other agencies using supplier
  - Reviews performance expectations & results across contract portfolio, & establishes improvements based upon market availability & best practices
  - Reviews competition expectations & results across contract portfolio, & establishes improvements
  - Establishes comprehensive contracting schedule across contract portfolio
  - Maintains & evaluates records of items purchased, costs, deliveries, product performance, & inventories
  - Defines & creates complex analyses & benchmark reports across portfolio of contracts

**MAJOR WORKER CHARACTERISTICS**

Knowledge of sourcing principles; state & agency sourcing policies, procedures & regulations\*; public relations; employee training & development\*; contracts; ERP systems\* (e.g., OAKS FIN). Skill in operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting\*. Ability to define problems, collect data, establish facts & draw valid conclusions; understand technical manuals & verbal instructions associated with sourcing procedures; proofread technical specifications, recognize errors & make corrections; identify noncompliance & formulate response; use statistical analysis; gather, collate & classify information about data, people or things to forecast & plan; write business correspondence or communications reflecting sourcing procedures; develop & maintain good rapport with internal agency customers & vendors.

(\*)Developed after employment.

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

Completion of graduate core in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 6 mos. exp. or 6 mos. trg. in purchasing/procurement/sourcing.

-Or completion of undergraduate core in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 18 mos. exp. or 18 mos. trg. in purchasing/procurement/sourcing.

-Or 42 mos. exp. or 42 mos. trg. in purchasing/procurement/sourcing to include exp. in performing spend analysis, developing sourcing strategy & evaluating vendor performance.

-Or 12 mos. exp. as Senior Sourcing Analyst, 64513.

-Or 24 mos. exp. as Sourcing Analyst, 64512.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Not applicable.

**UNUSUAL WORKING CONDITIONS**

May require travel; may be required to work long or unusual hours during peak operational periods.