#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Procurement Compliance Analyst

**Job Number:** A-505 | VIP: 2008

**Band:** OPSEU-10 (Subject to Review)

**Department:** Financial Services

**Supervisor Title:** Director, Strategic Procurement and Compliance

**Last Reviewed:**  December 5, 2024

#### **Job Purpose:**

#### Under the leadership of the Director Strategic Procurement and Compliance, the Procurement Compliance Analyst is responsible for tracking, analyzing and reporting on procurement data, understanding and adhering to procurement legislative and policy compliances and directives, and providing client support on procurement programs including education and training. The position promotes the effectiveness and efficiency of procurement activity through reporting and analysis. Supports various initiatives including process redesign and enhanced digital culture.

#### The incumbent’s typical work activities include regular tracking and reporting on procurement activities, working with departments educating on procurement programs/projects, analyzing purchasing reports, creating both external and internal department reports, managing the content on the Procurement Services website and assists with developing tools and training materials promoting the highest standards of procurement. The incumbent will support various purchasing-owned programs, such as sustainable and social procurement programs, with programs being in various stages of maturity that will require development and on-going operational support.

#### Will play a key role in ensuring procurement projects and programs, specifically change initiatives, meet the department objectives by increasing client adoption, improving systems/technologies and reporting on achievement of results and outcomes. Prepares and presents procurement reports as required.

Other related work includes supporting clients and procurement staff as required. Acts as coach and mentor in the role of change sponsor.

#### Key Activities:

**Procurement Analysis and Reporting**

* Provides analytical support for the Strategic Procurement and Compliance Director which would include the creation of report templates, data mining, data tracking and analysis of information such as:
	+ Procurement spending on a quarterly and annual basis;
	+ Contract utilization reporting on a quarterly and annual basis;
	+ Ad hoc reports for departments;
	+ Social procurement activity and success measures;
	+ Bill S-211 activity and success measures;
	+ Corporate credit card usage and compliance reports;
	+ The Building Ontario Business Initiative Act (BOBIA) activity and success measures;
	+ Year end associated reports and encumbrance tracking.
* Produces the annual Procurement Activity Report for the Ministry of Government Services for review by the Director prior to submission.
* Provides input on Procurement Key Performance Indicators (KPIs) as directed.
* Prepares annual reporting on contract expiry dates to ensure appropriate resource planning and lead time for contract life-cycle strategy development and client support.
* Prepares various analyses including:
	+ Suppliers spend analysis to provide statistical information for financial planning;
	+ Out-of-contract spend analysis to identify contract and savings opportunities;
	+ Supplier contract term analysis to identify non-compliance and spend leakage.
* Develops tools and metrics to evaluate conformance of procurement activities.
* Leverages analytics to support the Procurement Department goals and objectives.
* Reviews and validates procurement reporting data.

**Procurement Programs and Projects**

* Works with Director Strategic Procurement and Compliance to develop strategic objectives for various procurement programs such as accessible, sustainable and social procurement programs, supplier performance programs, and continuous improvement and client support programs.
* Assists managing University community and supplier inquiries including client service issues, communications, education and training of procurement programs and projects, liaising between clients and suppliers when required.
* Works with the Director Strategic Procurement and Compliance to develop programs such as accessible, sustainable and social procurement including participating in the rollout of the programs across the University, managing supplier database, being the change agent for programs including communications and acting as a point of contact for the programs;
* Administers the supplier performance program, including providing reports, providing department guidance on the program, supporting the use of supplier performance technology platforms, and being the liaison between departments and suppliers.
* Governs the BOBIA program, including providing reports, providing department guidance on the program, establishing Ontario attested vendors database, and being the liaison between departments and suppliers ensuring compliance and direction pertaining to the Act.
* Participates in various purchasing consortiums outside of the University with the intent to make recommendations of new or enhanced programs to the Director Strategic Procurement and Compliance, based on changing purchasing trends and on continuous improvement opportunities.
* Participates in the rollout of new procurement programs and projects as they are developed.

**Procurement Operations**

* Supports, educates, and provides guidance to departments on Trade Agreements and the Broader Public Sector (BPS) directive to ensure procurement compliance and its associated procurement reporting to government agencies.
* Maintains procurement templates and the Procurement Tool Kit portfolio.
* Maintains procurement databases, including updates to contract and vendor databases (i.e. archiving contracts, implementing supplier performance surveys, creating client role assignment in Bonfire, developing vendor settings in Bonfire).
* Closes, archives and cancels requisitions, PO’s and contracts when required.
* Provides training and guidance by orienting others to work processes and methods on an on-going or ad hoc basis. Client support for procurement programs and project development including operational support.
* Works with the Director to develop business processes to support the implementation of improved procurement functionality and tools.
* Delivers information sessions to departments on procurement technologies and processes, including programs such as corporate credit card, purchase requisitioning, sustainable and social procurement.
* Assists with procurement training documents, including procurement training for new hire onboarding.
* Maintains the content for Procurement Services website and has responsibility for ensuring all information is current.
* Identifies opportunities to leverage and expand the corporate credit card program.
* Maintains reporting databases and information.
* Assists with year-end activities.
* Assists department in creating PO’s and contracts in times of high volume.
* Provides department support for sourcing requirements in times of high volume.

#### Education Required:

* University Degree (3 years) in a business related discipline or Supply Chain Management Program Principles Advanced Diploma (3 years).
* CPPB/CPPO/CSCMP/SCMAO/SCC procurement designation preferred or other applicable procurement program enrollment or certification completion.

#### Experience/Qualifications Required:

* Minimum five (5) years procurement related experience, which includes purchase order creation, contract management, vendor interaction, working knowledge of the Broader Public Sector Directive and Trade Agreements and financial reporting.
* Project management experience preferred.
* Demonstrated ability to work independently as well as function as a team player.
* Possession of a high level of individual initiative and demonstrated ability in flexible problem solving and critical thinking.
* Working knowledge of supplier networks and marketplace sourcing pertinent to the needs of an educational institution.
* Excellent computer skills with ability to manage complex spreadsheets and reporting creation and analysis.
* Effective communication skills and presentation skills.
* Demonstrated commitment to customer service and building relationships.
* Exceptional time management and organizational skills.
* Meticulous attention to detail.
* Willingness to embrace and support change.
* Expert level in Microsoft Office applications, particularly Excel skills; Adobe Acrobat Pro and PowerPoint

#### Supervision:

* No formal supervision of others is required.

**Job Evaluation Factors:**

##### Analytical Reasoning

*Strong critical thinking, analytical skills and business planning skills. Managing large amounts of data. The need to prepare and analyze reports and provide findings to staff and management.*

*Examples:*

* *Provides guiding commentary on the analysis of reports, what are the trends, historical context, and external environment context. Makes recommendations on what actions need to occur to meet department KPI’s*
* *Dealing with change management and its associated impacts. Work with departments on training, continuous improvement projects and program communications. The individual will identify and communicate all program changes to departments and vendors and will ensure training and communications are developed to assist in the efficient roll out of the change. The individual will do the analysis that supports program decision, will define the impact on others about the decision, and will define the rollout timeframe based on their familiarity with the project.*

##### Decision Making

*Determine how best to communicate processes. Decides how to administer reporting data outputs and documenting results effectively.*

*Examples:*

* *Recommends a course of action or makes decisions that will direct how others will perform activities. A change agent for procurement programs (i.e. sustainable and social procurement guidance to staff on how to source suppliers and follow processes).*
* *When a report outcome is requested, will need to review what report parameters are available, or what report parameters need to be built. Testing the report is required to ensure it meets objectives. Proper indexing of reports is required so that it can be used when required in the future. Some reports may pull non-system information (such as sustainable and social procurement key metrics reporting). Would need to identify and validate the source of information for ongoing reliability and then document. Decision making will be required to determine a solution for the report requirement.*

##### Impact

*Need for compliance in reporting to government agencies and adherence to BPS Directives, Trade Agreements and any applicable regulatory or legislative requirements.*

*Examples:*

* *Enterprise risk if failure to comply with regulatory reporting requirements resulting in substantial penalties and potential damages to the University’s reputation. For instance, Bill S-211 requires annual reporting per a defined timeline that could incur a financial penalty when late or non-compliant.*
* *Supporting continuous improvement procurement projects that will impact change to others within the University.*

##### Responsibility for the Work of Others

*None*

##### Communication

*Internal:*

* *Department Director, staff, management, and faculty to provide support, training and advisement regarding procurement programs, processes, policies, procedures and procurement legislation*
* *IT staff for report development, technical information, and advisement*
* *Finance team regarding processes, training and support*
* *Procurement team regarding reporting outcomes, programs, training and support*

*External*

* *Suppliers regarding procurement process, supplier performance*
* *Group Purchasing Organization’s*
* *Other public institutions procurement agents*
* *Government Ministry agents*

##### Motor/ Sensory Skills

* *Fine Motor Skills/Dexterity - Data entry input*
* *Hearing, reasoning skills - Reasoning and listening skills required to reply to inquiries*
* *Visual, sensory distinction - Required to review report data*
* *High level of mental and visual concentration reviewing data and data entry accuracy*

##### Effort

*Mental:*

* *Sustained concentration - Required when problem solving and reviewing complex reports. Concentrated visual and auditory attention constantly.*
* *Focus and sensory effort – Interpreting, testing and reporting large scale data*

*Physical:*

* *Sitting - Keyboarding*
* *Walking – meeting with clients in locations outside of office space*

##### Working Conditions

*The majority of incumbent’s time is spent in normal office conditions with the typical fluctuations in interactions and interruptions.*

*Physical:*

* *Constant repetitive motion – Extended data entry and report analysis for lengthy periods of time can cause back strain and eye strain. Daily requirement.*

*Psychological:*

* *Complaints/criticism/dealing with difficult people - Responding to staff complaints when implementing process change.*
* *Deadlines/time pressures - Pressure of meeting deadlines i.e. meeting report deadlines with Ministry that can be punishable through costly penalties if not submitted on time or meet data compliance requirements.*