#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Procurement Officer

**Job Number:** SO-191 | VIP: 1433

**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, acts as a Procurement Officer for the University for efficient and effective operations of procurement in accordance and compliance with Ontario’s Broader Public Sector Procurement Directives, relevant legislation and University Policies. The primary purpose of this job is to research and prepare data in support of the best procurement practice, price, delivery, and quality of goods and services for the University's use. In addition, the Procurement Officer will provide decision-making support to faculty and staff by reviewing and recommending sourcing scenarios and group buying opportunities. The Procurement Officer is responsible for business processes spanning the entire procurement cycle including: sourcing, ordering, tendering, negotiating and preparing procurement business contracts for various commodities; supplier management including expediting, managing vendor relations and performance, and problem solving; maintaining commodity, vendor file cards, tendering and contract files; coordinating University customs activities through Trent’s Customs Broker and in accordance with CBSA compliances; administration of the Corporate Credit Card program; providing assistance and guidance to faculty and staff in all aspects of procurement and business agreements; answering inquiries and providing direction to suppliers and clients; and special procurement related assignments as advised by the Director Strategic Procurement and Compliance. Ensures the highest of integrity regarding procurement practices and provides exemplary customer support.

#### Key Activities:

**Procurement Sourcing**

* Reviews purchase requisitions on various commodities most notably for those involving Facilities, Research and Operating funds, and assembles information on specifications, usage patterns, licensing requirements, and market availability. Using purchasing experience and sound judgment determines the appropriate acquisition process to ensure that the University is receiving the best combination of price, quality, service, and delivery and mitigates risk for the organization using sound procurement practices. Procurement sourcing options include:
	+ open or invitational competitive processes,
	+ use of government or collaborative standing offers,
	+ single source negotiations, or
	+ extension to existing contracts.
* In collaboration with academic, research, ancillary and administrative departments, prepares Request for Quotation, Requests for Tender, Request for Proposals, Request for Prequalification, Request for Expression of Interest, ACAN’s, or tendering format as is appropriate for competitive procurements or Non-Competitive Procurements for limited tendering exemptions.
* Evaluates competitive bids, negotiates with suppliers, prepares business agreements, debriefs vendors on evaluation decisions, determines the proper Goods and Services and Provincial Tax status on purchases, and signs purchase contracts within appropriate signing authority.
* Analyzes procurements for recommendations on improving purchasing methods through market trending, value analysis including discount and savings opportunities, standardization, and utilization of cooperative, collaborative and GPO marketplace.
* Supports accessible, sustainable and socially responsible purchasing opportunities and purchasing decisions consistent with university priorities, policies, and governing legislation such as Buying Ontario Business Act and Modern Slavery Act (also referred to as Bill S-211).

**Procurement Activities**

* Maintains positive working relationships with suppliers, and with academic, research, ancillary and administrative departments to ensure goods and services procured meet the University’s needs.
* Is authorized to purchase goods and services up to authority approval defined in Trent’s Procurement of Goods and Services Policy. Provides purchase analysis, summary and recommendations for appropriate approval designates when procurement exceeds the Officers’ authority of approval.
* Assists faculty and staff in the preparation of purchase requisitions by obtaining product information, quotations, and alternate sources. Advises and recommends sources of supply to university staff and faculty based on experience and expertise.
* Prepares fair value / market value assessments on restricted fund procurements relevant to the Canadian Foundation for Innovation (CFI) audit compliance and ensures CFI procurements meet the appropriate funding structure and acquisition criteria.
* Prepares summary documentation seeking approval by the Director Strategic Procurement and Compliance, Associate Vice President Finance, the President and Board of Governor dependent on total procurement value as defined by the Procurement of Goods and Services Policy.
* Maintains and supports clients using on-line ordering systems for supplies contracts (e.g., Fisher Fast, Staples, Amazon Business, etc.).
* Reviews the purchase order open order report monthly and takes the appropriate action to expedite the timely receipt of goods.
* Reviews requisition status report weekly to follow up on outstanding or unapproved order requests.
* Reviews encumbrance reporting to action outstanding orders for fiscal year end close out. Works closely with Accounts Payable Advisors to ensure PO invoice reconciliation.
* On various commodities, negotiates with the supplier for the return of incorrect, unacceptable goods, or damaged goods. Arranges to have Facilities personnel remove the goods from university property and place with the appropriate carrier when necessary.
* Assists Shipping and Receiving regarding shipment /transportation related discrepancies and variances.
* Ensures procurement of chemicals and hazardous materials are compliant with defined University standards including acquisition details for HECHMET inventory and delivery identification.
* Administers the sale of university assets through a defined online auction site.

**Administration of the Corporate Credit Card Program**

* Administers the University’s Corporate Credit Card program, including: assisting with reporting and approval hierarchy compliant with policy; onboarding new cardholders through an application process; client support and training; advising cardholder access to suite of departmental accounts and object codes; assist Accounts Payable with reviewing and processing card suspensions and cancellations; maintaining documentation and approval of charging credit limit privileges for each card (i.e., card applications, card cancellations, merchant restrictions, GL charging privileges support, suspension history, card maintenance).
* Prepares reports including monthly transaction data and ad hoc reports (e.g., payments to specific vendors, unallocated credit card charges, total spend, etc.). Provides accurate supporting documentation when allocating credit card transactions using Finance Expense Management tool for transaction activity on the Officer’s card.
* Promotes the use of credit card for clients and payments on credit card whenever possible for low value dollar transactions and travel expenses to decrease the amount of expense reimbursements being submitted and enhance the credit card rebate program.
* Works with Accounts Payable to review virtual card payment type opportunities whenever possible.

**Colleague Vendor Data Base Maintenance**

* Performs vendor record maintenance in Colleague that facilitates the creation, updating and maintenance of vendor card records.
* Vets and validates vendors required before vendor record creation or maintenance to existing vendor records.
* Prevents duplicate entries and maintain vendor database integrity.
* Ensures complete and accurate information resulting in easily searchable vendor ID and payment safeguard.
* Ensures vendor is legitimate to mitigate risks associated with fraud to the University.
* Updates vendor payment method and terms ensuring sound supporting documentation is in place to verify the information that includes a verbal confirmation with vendor representative regarding payment application information.

**Compliance**

* Ensures that contract laws, provincial legislation, procurement regulations, federal trade agreements, and procurement directives related to Canadian procurement standards are applied, and that the University’s code of conduct in business transactions is followed. Provides accountability and transparency for procurement of goods and services and decision processes.
* Maintains and organizes documentation associated with requisitions, purchase orders, tenders and contracts to be maintained for 7 years.
* Promotes and raises awareness of the procurement code of ethics and best practices that apply to procurement within the University community. Analyzes difficult situations and reviews with Director whenever unclear issues arise.

**Other**

* Provides training and daily guidance to new or temporary procurement staff and clients as required.
* Represents the University at various procurement associations and working groups. Represents the Department on University business as requested by the Director Strategic Procurement and Compliance.
* Supports membership assignments and community of practices associations as required.
* Attends training sessions and continued educational activities as required to keep current with relevant procurement requirements and legislative updates.

#### Education Required:

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

#### Experience/Qualifications Required:

* Minimum of five (5) years of progressive procurement experience with knowledge of functionalities of major procurement business systems and understanding of procurement to pay workflows.
* Broader Public Sector experience preferred.
* Ability to work in a fast-paced procurement environment.
* Strong working knowledge and understanding of Ontario’s Broader Public Sector Procurement Directive, Trade Agreements (CFTA, CETA), vendor of record arrangements, standard contractual terms and conditions, Harmonized Sales Tax, customs processes, accessible procurement, sustainable and social procurement practices, and understanding of general buying techniques (e.g. ABC Analysis, Quantity Discount Analysis, Systems Contracting, etc.).
* 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.
* Ability to assume full responsibility for delegated work and willingness to be held accountable for decisions taken.
* Working knowledge of University faculty, staff, account responsibility, department structure and Finance/Purchasing policies and procedures. Must be able to utilize this information to work with faculty and staff, ensuring adherence to policy and procedures.
* Working knowledge of Trent’s supplier network and various markets pertinent to the needs of an educational institution.
* Knowledge of Ellucian Colleague Purchasing and Accounts Payable Modules preferred.
* Experience supporting a corporate credit card program.
* Excellent computer skills including Office, Word and Excel.
* Effective negotiating skills.
* Attention to detail.
* Strong communication skills both verbal and written.
* Demonstrated commitment to customer service and building relationships and ability to work with diverse stakeholders.
* Exceptional time management and organizational skills.

#### Supervision:

* No formal supervision of others is required.

**Job Evaluation Factors:**

##### Analytical Reasoning

*Ability to conduct market research, analyze complex and lengthy bidder submissions, award appropriate scoring per defined tender evaluation matrixes, interpret contract language and support purchasing decisions for the University. Ability to conduct professionally and competently vendor negotiations and bidder debriefings to avoid negative consequences on the University such as reputational risk and vendor disengagement in competitive procurement events.*

*Ability to interpret BPS Directives, complex Trade Agreements and limited tendering exemptions to determine permissible methodology regarding procurements. Reasoning to ensure non-discrimination against suppliers and ability to mitigate potential legal challenges of which can result in reputational risk and cost impacts to the University. Problem solving and judgement are needed to lead recommendation for a procurement. Reasoning and judgement that are practical and defendable solutions to the circumstances at hand is key. Failure to do so may lead to failed procurements, bidder protest, legal proceedings, punitive damages and loss of reputation.*

##### Decision Making

*Ability to determine the appropriate procurement process based on the needs of the end user, BPS Directives, intergovernmental trade agreements, applicable legislation and University policies and procedures. The procurement outcomes of these decisions are published publicly and, dependent on total procurement value, are reportable to the Ministry.*

*In preparing an RFx, must be able to recognize and prioritize key requirements, establish appropriate criteria to measure the bidder’s ability to fulfill those requirements, and establish a schedule for bid submission, evaluation and award that meets the needs of the end user.*

*Must stay current on industry best practices to ensure proper direction regarding procurement strategies used and comply with legislation, trade treaties, policy and are of best and fair business practices. Providing advice to clients that they must consider carefully before making a decision pertaining to a procurement initiative.*

##### Impact

*Inappropriate handling of the procurement processes and contract awards can lead to disgruntled or lost confidence of suppliers, faculty and staff, damage to the University’s reputation, delays in receiving required goods or services, and escalation of issues to Director Strategic Procurement and Compliance and AVP, Finance for resolution.*

*On an annual basis, significant transactions are processed using the Corporate Credit Card Program. Failure to manage the program and support clients can result in loss of rebate opportunities and increased workflows for Procurement for low dollar transactions through the requisitioning system.*

##### Responsibility for the Work of Others

*N/A*

##### Communication

*Ability to exchange and interpret information for both internal and external clients.*

*Internal:*

* *Staff and faculty, provide support and advice regarding procurement options, processes and procurement legislation*
* *Staff and faculty, explain and interpret contract clauses, University procedures and policies*
* *Staff and faculty, provide information and advice regarding supplies ordered*
* *IT staff regarding Finance ERP system*
* *Accounts Payable staff regarding contract payment terms, construction lien act payment requirements, vendor data system set up, credit card program, year-end encumbrance reporting and payment status inquiries.*
* *Shipping and Receiving Centre for receipt validations, review of damaged shipments, customs inquiries and importations, general logistics support regarding procurements.*

*External:*

* *Suppliers, ordering, expediting product information*
* *Suppliers, discussing and clarification of contract clauses*
* *Suppliers, handling of procurement processes and vendor debriefing*
* *Suppliers, negotiating of supplier contracts*
* *Suppliers, contract performance*
* *Suppliers, verification of vendor card set up and maintenance validation*
* *Working group associations and procurement membership agencies*
* *Procurement personnel in other public institutions, discussing procurement best practices*
* *Client Relationship Representative regarding the Corporate Credit Card program*
* *Ontario Education Collaborative Marketplace regarding commodities that fall under OECM contracts and any other GPO entities (i.e. Supply Ontario, Kinetics GPO, Canoe Procurement).*

##### Motor/ Sensory Skills

* *Fine Motor Skills/Dexterity – Accuracy and speed in data entry input for large volumes of orders,*
* *High level of mental and visual concentration reviewing tendering documents, bid proposals, contracts, policy and legislative documentation.*
* *Hearing, reasoning skills - Reasoning and listening skills required to reply to inquiries in virtual meetings, over the telephone and in person*
* *Visual, sensory distinction - Required to read purchase requisitions and quotation documentation, including terms and conditions, ensuring correct products are ordered under the appropriate ordering standards.*
* *Attention to detail.*

##### Effort

*Mental:*

* *Sustained concentration - Required when problem solving when working with clients and suppliers to address issues*
* *Focus and sensory effort - Required to interpret quotations, purchase orders, requisitions and detailed contracts; constant interruptions increase effort required.*
* *Mental effort and judgement are required in decision making for procurement events.*
* *Constant interruptions, shifting priorities, daily conflicting demands, emotionally charged situations requiring professionalism and tack.*
* *High work volume and ability to prioritize and meet deadlines.*

*Physical:*

* *Sitting - Extensive strain on the body for sitting for extended periods while working at computer. Visual eye strain reviewing computer documentation and reports.*
* *Bending and reaching - Retrieving files from file cabinets or bookshelves*
* *Walking, standing, lifting, carrying - Physical effort required when moving office supplies within the Finance Dept. i.e. boxes of printer paper and files for archiving*

##### Working Conditions

*Physical:*

* *Constant repetitive motion - Data entry and computer use for lengthy periods of time can cause fatigue, back strain and eye strain*

*Psychological:*

* *Dealing with angry, confrontational people - Required to respond to irritated suppliers re: late payment of their invoices or not the top ranked proponent in a tender award.*
* *Complaints/criticism - Responding to staff complaints re: short shipments, delayed shipments and incorrect products.*
* *Deadlines/time pressures - Pressure of meeting deadlines i.e. closing of year-end, urgent purchases or tender requirements needing to meet aggressive project timelines*
* *Procurement has increasingly become the focus of lawsuits over unfair or protested awards. Dealing with disgruntled suppliers and the ability to support decisions in procurement awards can be emotionally challenging, impact vendor relationships and loss of goodwill for the University.*
* *Often work under tight project timelines, stressful situations and must adapt to a fast-paced environment.*