

TEXAS A&M UNIVERSITY-KINGSVILLE

Title: Organization
Procedure No.: PP-20

Approved by:
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I. Purpose

The purpose of this policy is to establish the hierarchy of authority and responsibility upon which all of the policy and procedure bulletins in this manual are based.

II. Scope

This policy applies to all employees.

III. Responsibility

The President of the University is responsible for the maintenance of this policy via the Director of Procurement and General Services.

IV. Organization

The organization below shows the positions referred to in this manual.

President

Vice-President for Fiscal Affairs

Assistant Vice President for Fiscal Affairs

Director of Procurement and General Services

Assistant Director of Procurement &
General Services & HUB Coordinator

Central Receiving/Stores
Supervisor

Senior Purchaser

Storekeeper

Purchaser

Receiving Clerk

Purchasing Assistant

Stores Clerk

Purchasing Clerk

DUTIES AND RESPONSIBILITIES OF
DIRECTOR OF PROCUREMENT AND GENERAL SERVICES

Statement of Responsibility

Plans, organizes, controls, and directs activities related to the procuring, inventorying, expediting, warehousing, shipping, receiving, transporting, liquidating, and disposing materials and services for the University. In fulfilling the mission of the office, the Director is responsible for procuring all goods and services, maintaining an inventory of goods common to the instructional and service units, managing the fixed capital assets, and disposing of surplus property in support of the mission of the University.

Specific Duties:

Reviews and approves all procurements for materials and services for the University.

Negotiates and prepares interagency service contracts.

Monitors all Procurement activities to ensure compliance with all statutes, regulations, and policies.

Supervises seven full time employees and eight to ten part time employees.

Directs storeroom activities including inventory and delivery of items to departments.

Prepares documents to charge departments for materials and supplies ordered.

Responds to audits pertaining to procurement activities.

Prepares and approves reports concerning Procurement Activities including HUB activities, procurement levels, expenditures, and Capital Equipment inventories.

Corresponds with vendors and State Purchasing and General Services Commission, and prepares correspondence concerning Procurement Activities for the V.P., Fiscal Affairs.

Manages the Equipment Maintenance Program.

Manages the disposal of surplus and salvage property.

Obtains competitive bids and awards contracts.

On request, furnishes advice and statistics concerning business activities of the University to the Assistant V.P. for Fiscal Affairs and V.P. for Fiscal Affairs.

Advises departments in developing material and service requirements.

Writes specifications to satisfy requirements for services and supplies.

Monitors vendor performance.

Resolves disputes between vendors and University.

Administers and maintains custody of Property Management Program.

Develops and structures financed purchases.

Serves as HUB coordinator for University.

Serves as University Property Officer

Working Relationships

Title of Immediate (ADLOC) Supervisor:

Assistant V.P. for Fiscal Affairs

Other Supervisors:

Vice President of Fiscal Affairs

President of the University

Chancellor of the System

Board of Regents

Number of Employees Supervised:

Seven full time, eight to ten part time.

Titles of Employees Directly Supervised:

Purchaser

Property Manager/Buyer

Stores Supervisor/Buyer

Storekeeper

Shipping and Receiving Clerk (2)

Purchasing Accounting Clerk II

Invoice Clerk

Minimum Qualifications for this Position

Education and Certifications:

Bachelors Degree (preferably in Business Administration) is required, studies in Business Law, Purchasing, and Management are highly desirable. An M.B.A , C.P.M. and C.P.P.O are highly desirable

Experience:

Three years purchasing management is required. Ten years in management in business and or government is desirable.

Special Requirements/Skills:

Strong Interpersonal Skills.
Strong Written and Verbal Communications Skills.
Ability to schedule and prioritize work load.
Ability to work under a complex array of federal and state regulations.
Able to utilize and operate P.C.s and mainframe terminals and programs.
Ability to delegate work.
Ability to train subordinates.
Strong technical, mechanical skills.
Ability to meet deadlines.
Ability to interpret complex regulations and contracts.
Strong knowledge of office procedures.
Self-motivation to implement work/cost saving programs.

This position requires that the individual become very proficient in State Purchasing and General Services Commission rules and procedures concerning purchasing and property management. The individual must be able to communicate both verbally and in writing to a diverse audience. Operations require that the Director be able to work in a complex environment that requires the management of many functions simultaneously. Numerous deadlines may require night and weekend work.

DUTIES AND RESPONSIBILITIES OF
PURCHASER

Statement of Position Scope and Responsibility

Provides administrative, supervisory, and technical assistance to Procurement Director in support of University's purchasing. Develops specifications for equipment, supplies, and services, prepares and evaluates bids, develops and maintains bid list, and ensures compliance with applicable regulations and procedures.

Specific Duties

1. Primary Duties

Supervises the Office of Procurement and General Services in the absence of the Director.

Reviews and classifies Requisitions for action in absence of Director of Procurement and General Services.

Prepares Invitations for Bids.

Assists departments in identifying requirements.

Deals with vendors to obtain prices and delivery.

Obtains bid information.

Evaluates bids and recommends awards.

Expedites Purchase Orders.

Prepares various reports for purchasing activities.

Coordinates freight activities with shipping and receiving.

Monitors purchasing activities to ensure conformance with appropriate procedures, policies, and regulations.

Manages maintenance contracts for equipment.

2. Secondary/Miscellaneous Duties

Processes receiving reports.

Assists Property Manager and Director of Procurement and General Services in disposal of surplus and salvage property.

Performs other duties as assigned or required.

Working Relationships

Title of Immediate (ADLOC) Supervisor:

Director of Procurement and General Services

Other Supervisors:

Assistant V.P. for Fiscal Affairs

Vice President of Fiscal Affairs

President of the University

Chancellor of the System

Board of Regents

Number of Employees Supervised: None

Titles of Employees Directly Supervised: N/A

Minimum Qualifications for this Position

Education:

Bachelor's Degree, preferably Business

Special Certifications/Training:

Formal and informal training in purchasing (especially training in Purchasing Law and State Purchasing Procedures) is expected.

Certification as Professional Public Buyer or Certified Purchasing Manager should be a goal of the Purchaser.

Experience (years and type):

Minimum three years experience in a State Agency environment is desired. Three years experience in a State University environment is preferred. Five years experience in purchasing is acceptable.

Special Requirements/Skills:

Strong Interpersonal Skills.

Strong Written and Verbal Communications Skills.

Ability schedule and prioritize work load.

Ability to work under a complex array of federal and state regulations.

Mechanical abilities relating to construction, equipment maintenance, and scientific instruments.

DUTIES AND RESPONSIBILITIES OF

STORES SUPERVISOR/BUYER

Statement of Position Scope and Responsibility

Responsible for the operation of the Storeroom and Central Receiving. Duties include reordering of supplies and supervision of storeroom personnel.

Specific Duties

1. Primary

Supervise Storeroom and Central Receiving with four employees and 2 to 3 student employees.

Process and approve invoices pertaining to Storeroom.

Coordinate and reconcile shipments and deliveries of storeroom orders.

Maintain inventory control and reorder levels.

Conduct annual storeroom physical inventory.

Receive, issue, and maintain records on gas cylinders.

Coordinate activities of Storeroom and Central Receiving with departments on campus.

Process IDT's

Research items ordered for suitable substitutes.

Secondary

Deal with vendors to obtain prices and delivery.

Obtain bid information.

Evaluate bids and recommends awards.

Expedite Purchase Orders.

Coordinate freight activities with shipping and receiving.

Perform other duties as assigned or required.

Issues P.O.s as per established Storeroom/Spot procedure

Working Relationships

Title of Immediate (ADLOC) Supervisor:

Director of Procurement and General Services

Other Supervisors:

Assistant V.P. for Fiscal Affairs

Vice President of Fiscal Affairs

President of the University

Chancellor of the System

Board of Regents

Number of Employees Supervised:

Three full time and two-three part students

Titles of Employees Directly Supervised: Storeroom Clerk, Receiving Clerk, Supply Clerk

Minimum Qualifications for this Position

Education:

High School Education is required. It is desirable for this individual to have one to two years college.

Special Certifications/Training:

Informal and formal training in purchasing procedures and inventory management is desirable.

Experience (years and type):

Two to three years experience in a State Agency environment is desired. Three years experience in a State University environment is preferred. Experience in a storeroom/central receiving operation is preferred. Previous supervisory experience is highly desirable. Work on weekends and after hours may be required.

Special Requirements/Skills:

- Strong Interpersonal Skills.
- Ability to direct subordinate employees
- Written and Verbal Communications Skills.
- Ability schedule and prioritize work load.
- Ability to work under a complex array of federal and state regulations.
- Able to utilize and operate P.C.s and mainframe terminals and programs.

DUTIES AND RESPONSIBILITIES OF
STOREKEEPER II

Statement of Position Scope and Responsibility

Maintain storeroom inventory and processes order.

Specific Duties

Issue supplies to customers. Take phone and walk-in orders for supplies and pull items from inventory to fill orders. Provide price and delivery quotes to customers.

Process issue and receipt transactions. Post all transactions to computer. Order cards for inventory. Assign inventory numbers to new products. Prepare issue cards. Prepares IDT (Interdepartmental Transfers) documents.

Supervise storeroom in absence of Storeroom Manager.

Place stock in proper bin location and enter on inventory card. Inspect incoming freight and supplies, verify count and condition. Restock product bins from backstock. Maintain inventory of backstock.

Account for all issues to departments.

Monitor storeroom stock levels and initiate reorders.

Perform periodic inventory spot audits and annotate records.

Maintain cleanliness of warehouse, cooperate with other staff to sweep, empty trash cans, and stack empty boxes.

Prepares delivery tickets.

May supervise one to two part time workers.

Issue Purchase Orders to Physical Plant in absence of Stores Supervisor.

Inspect incoming gas cylinders, annotate serial numbers in data base, track cylinder locations.

Performs other duties as assigned or required.

Working Relationships**Title of Immediate (ADLOC) Supervisor:**

Stores Supervisor/Buyer

Other Supervisors:

Director of Procurement and General Services
Executive Director of Administrative Services
Vice President of Fiscal Affairs
President of the University
Chancellor of the System
Board of Regents

Number of Employees Supervised: None

Titles of Employees Directly Supervised: N/A

Minimum Qualifications for this Position**Education:**

High School Education

Special Certifications/Training:

None

Experience (years and type):

Minimum one year experience. Must be able to utilize a computer terminal. Must have a basic understanding of inventory principles.

Special Requirements/Skills:

Strong Interpersonal Skills.
Able to process routine detailed documents.

DUTIES AND RESPONSIBILITIES OF SHIPPING-
RECEIVING CLERK I

*	Pull stock from inventory to fill orders. Sort orders and incoming freight for delivery to customers.	20
*	Load orders and merchandise on van. Deliver orders and merchandise to customers across campus. Secure receiving signature from customers.	40
*	Prepare delivery log for outgoing freight.	1
	Prepare and package materials for outgoing shipment.	1
*	Restock store shelves with shipments. Place products in bins. Pull cards and annotate quantity received.	10
*	Wait on customers at counter. Take walk-up and phone in orders. Pull orders from shelves. Pull inventory cards. Annotate card with quantity pulled and secure customer signature.	10
	Receive freight. Unload freight trucks. Inspect packages. Reconcile bill of lading to actual box count. Record all shipping information on receiving log. File bills of lading. Operate fork truck.	2
	Identify relative Purchase Order Number for each package. Contact Purchasing Office and Vendor to resolve missing P.O. numbers. Sort incoming freight with appropriate P.O. for delivery to customers	1
	Record freight package information on FAMIS purchasing data base (mainframe)	1
	Contact shipper and vendor when damaged freight is suspected. Resolve freight responsibility, prepare damage freight claim tickets.	1
	Perform routine maintenance on van.	2
*	Clean up storeroom. Sweep, dust, restack, and store excess boxes.	5
	Count stock during annual inventory.	2
	Control personnel traffic through storeroom. Control inventory from theft, breakage, and deterioration.	1
	Assist customers with identifying goods for particular applications.	1
	Perform other duties as assigned.	2

DUTIES AND RESPONSIBILITIES OF SHIPPING-
RECEIVING CLERK II

*	Receive freight. Unload freight trucks. Inspect packages. Reconcile bill of lading to actual box count. Record all shipping information on receiving log. File bills of lading. Operate fork truck, van, pallet jacks, hand trucks.	40
*	Identify relative Purchase Order Number for each package. Contact Purchasing Office and Vendor to resolve missing P.O. numbers. Sort incoming freight with appropriate P.O. for delivery to customers	10
*	Record freight package information on FAMIS purchasing data base (mainframe)	15
*	Contact shipper and vendor when damaged freight is suspected. Resolve freight responsibility, prepare damage freight claim tickets.	1
*	Prepare delivery log for outgoing freight. File documents.	5
*	Inspect packages for hazardous chemical spill or leakage. Contain hazardous spill and leaks and report to proper authorities.	1
*	Prepare and package materials for outgoing shipment.	1
	Restock store shelves with shipments. Place products in bins. Pull cards and annotate quantity received.	5
	Load merchandise on van and deliver to customers.	2
*	Wait on customers at counter. Take walk-up and phone in orders. Pull orders from shelves. Pull inventory cards. Annotate card with quantity pulled and secure customer signature.	10
	Perform routine maintenance on van.	1
	Clean up storeroom. Sweep, dust, restack, and store excess boxes.	3
	Count stock during annual inventory.	1
	Control personnel traffic through storeroom. Control inventory from theft, breakage, and deterioration.	1
	Assist customers with identifying goods for particular applications.	2
	Perform other duties as assigned.	2

DUTIES AND RESPONSIBILITIES OF
PURCHASING DEPARTMENT CLERK

Statement of Position Scope and Responsibility

Processes receiving reports against Purchase Orders. Ensures that invoices receive proper approval and that they are reconciled to Purchase Order file.

Specific Duties

Processes receiving reports by entering receiving information on FAMIS accounting system. Prepares receiving approval forms and forwards to departments for action. Enters line item receiving on FAMIS accounting system. Audits bi-weekly Purchase Order status report and reconciles receiving/invoice discrepancies.	60
Responds to vendor inquiries concerning invoices. Expedites receiving reports from departments. Contacts state comptroller for proof of payment.	5
Resolves invoicing discrepancies.	10
Assists other personnel in processing Purchasing documents.	5
Performs other duties as assigned or required.	5
Reconciles statements to outstanding invoices.	5
Process Refund of Expense payments.	2
Supervises work study assistant.	8

DUTIES AND RESPONSIBILITIES OF PURCHASING DEPARTMENT ASSISTANT

Statement of Responsibility

Responsible for internal administration of Purchasing Department.
Ensures visitors are properly greeted and directed,
informs vendors of general purchasing procedures
ensures supplies for office are ordered on timely basis,
directs the updating of all internal accounting references,
maintains time sheets for work students,
updates all employee personnel files

Specific Duties:

Composes correspondence and prepares for Director of Procurement and General Services' signature
Supervises and delegates work of work-study and part time employees
Prepares Open Market, Local Spot, and Non-Auto purchase documents as per detailed specifications to ensure compliance with procedures of State Purchasing and General Services Commission
Maintains control of Purchase Order records of status and activity
Screens active P.O. files for previous and current year orders and expedites as needed.
Communicates with vendors concerning bid problems, delivery delays, payment status, and provides information on purchasing procedures
Prepares bid invitations per specifications.
Maintains active bid list.
Monitors and controls 31 day bid file
Reviews and routes requisitions to appropriate department or individual
Administers typewriter and office equipment service contracts.
Coordinates services and monitors vendor performance
Coordinates individual billings from remote utilities services
Supervises data entry on State Purchasing and General Services Commission automated order system.
Communicates with SPGSC program technicians on changes and errors in data entry system
Develops documents, orders, and reports from a wide variety of PC and Mainframe programs
Issues verbal P.O.s as per established procedures.
Responsible for expediting verbal P.O. records
Reviews incoming correspondence and coordinates proper distribution for action
Makes daily and routine decisions without referring to Director in determining priority of office work and expediting orders.
Assigns work to maximize office output.
Ensures that all deadlines are met.

Working Relationships

Title of Immediate (ADLOC) Supervisor: Director of Procurement and General Services

Other Supervisors:

Assistant V.P. for Fiscal Affairs
Vice President of Fiscal Affairs

President of the University
Chancellor of the System
Board of Regents

Number of Employees Supervised:
Two student workers

Titles of Employees Directly Supervised: N/A

Minimum Qualifications for this Position

Special Requirements/Skills:

Strong Interpersonal Skills.

Written and Verbal Communications Skills.

Ability schedule and prioritize work load.

Ability to work under a complex array of federal and state regulations.

Able to utilize and operate P.C.s and mainframe terminals and programs

It is very desirable for the individual to have formal training in office management. The individual must have superior written and verbal communication skills. Must be able to communicate horizontally and vertically within a complex organization. Must be familiar with the purpose, design, and implementation of a wide variety of forms and office procedures. This position requires extensive knowledge of the State Purchasing and General Services Commission procedures, the internal procedures of the Purchasing Department, and many software applications for the development of documents and reports.

DUTIES AND RESPONSIBILITIES OF PROPERTY MANAGER/BUYER

Responsible for the control of all university property including inventory and disposition.
Assists the Director of Procurement and General Services in procuring capital property and spot purchases
Marks all state property for identification
Maintains property records for accountability and inventory.
Manages mainframe property management program
Stores and re-allocates surplus furniture and equipment
Assists departments in identifying capital equipment requirements
Provides for equipment needs of registration
Identifies and ships surplus property to physical plant for repairs as necessary
Disposes surplus property in accordance with State, System, and University rules and procedures
Maintains Vehicle Insurance database
Files accident reports to System
Prepares monthly and annual reports regarding property control and inventory
Reconciles General Ledger to Fixed Assets monthly

Deals with vendors to obtain prices and delivery
Obtains bid information
Evaluates bids and recommends awards
Expedites Purchase Orders
Coordinates freight activities with shipping and receiving
Performs other duties as assigned or required.

Immediate Supervisor: Director of Procurement and General Services

Other Supervisors:

Assistant V.P. for Fiscal Affairs
Vice President of Fiscal Affairs
President of the University
Chancellor of the System
Board of Regents

Minimum Qualifications

High School Education is required. Training in accounting procedure is desirable. Training in State, System, and University property regulations, policies, and procedures is desirable. Informal and formal training in purchasing procedures is desirable. Minimum three years experience in a State Agency environment is desired. Three years experience in a State University environment is preferred. Strong Interpersonal Skills. Written and Verbal Communications Skills. Ability schedule and prioritize work load. Ability to work under a complex array of federal and state regulations. Able to utilize and operate P.C.s and mainframe terminals and programs.