

M E M O R A N D U M

TO: Board of Trustees

FROM: Erin Feore
Director of Human Resources

SUBJECT: Review, discuss, and possibly approve the Contracts and Purchasing Manager job description

REFERENCE: Resolution 1911, Policy and Procedure 144

DATE: October 1, 2024

I. RECOMMENDATION

That the Board of Trustees review, discuss and approve the final draft of the Contracts and Purchasing Manager job description.

II. BACKGROUND

The Contracts and Purchasing Manager job description was initially prepared and approved by the General Manager in December 2023. Following further review of the job description and having received helpful input from Trustee Tulloch and Chair Schmitz, the job description has been significantly updated. As required in Resolution 1911, Policy and Procedure 144, "...any newly created position reporting directly to the General Manager will need to first be created by the Board of Trustees, with approval of the job description by the Board of Trustees prior to recruiting for the position." Given the material changes recommended to the job duties of the position, Board review of the job description is requested.

III. ALTERNATIVES

As an alternative, the Board of Trustees may direct staff to refrain from changing the job description.

IV. ATTACHMENTS

1. Original copy of the job description for the Contracts & Purchasing Manager
2. Recommended changes by Trustee Tulloch (in blue) and Chair Schmitz (in red).
3. Draft copy of the job description for approval.

**Incline Village General Improvement District
Job Description**

Job Title: Contracts & Purchasing Manager
Job Number: 1226A
Salary Grade: 33
Department: Finance
Reports To: Assistant Director of Finance
FLSA Status: Exempt - Administrative
Prepared By: B. Magee/M. Bandelin/E. Feore
Prepared Date: 12/27/2023
Approved By: M. Bandelin
Approved Date: 01/10/24

SUMMARY

Under the general direction of the Assistant Director of Finance, this position plans, organizes, directs and administers the Incline Village General Improvement District's (IVGID) purchasing program; supervises assigned personnel in purchasing and contract administration activities; partners with District management to negotiate and review contracts for Board review and approval.

ESSENTIAL DUTIES AND RESPONSIBILITIES, not necessarily in order of priority, include the following. Assigned job tasks/duties are not limited to the essential functions.

1. Provides excellent customer service to customers and District partners and collaborators.
2. Reviews and administers District purchase orders and contracts, ensuring District compliance with applicable federal, state and local ordinances relative to procurement and contracting.
3. Reviews and signs bids, Request for Proposals (RFP), and Requests for Qualifications (RFQ) on behalf of the District, resolving disputes involving bid, RFP and contract issues.
4. Provides interpretation and advice for other District departments and venues regarding compliance with purchasing and contracting processes, procedures and laws.
5. Receives and reviews purchase requisitions for accuracy and adherence to state or federal requirements, Special District requirements, and policies and procedures of the Finance Division.
6. Places orders with chosen vendors to ensure the timely, cost efficient acquisition and delivery of required commodities and services.
7. Partnering with applicable personnel, prepares bid documents with terms, conditions and specifications for products or services for publication; advertises request for bid or RFP to attract likely suppliers; opens all bids submitted in a public forum; reviews and evaluates the merits of each bid in order to make recommendations for preferred suppliers to management.
8. Crafts, evaluates, negotiates and executes a wide variety of contracts covering a range of transactions.
9. Maintains records for correspondence and documentation in relation to established contracts and those in progress. Creates and maintains a contract management system internally to establish workflow related to specific contracts.
8. Develops purchasing and procurement guidelines and standards for use in the administration of purchasing functions and activities.

9. Writes reports, recommendations and correspondence to address a variety of issues related to the timely and cost efficient procurement of goods and services for assigned classifications.
10. Partners with District management, legal advisors and, as necessary, members of the Board of Trustees to mitigate common contract management risks, such as financial, legal, and security risks.
10. Evaluates operational performance, reviews work methods and procedures, and develops and implement changes in work processes to enhance efficiency.
11. Maintains a database of all purchasing and professional services contracts to include renewal dates. Evaluates vendor proposals to ensure all requirements are met and maintained.
12. Working closely with the Finance team, ensures financial obligations related to contract and purchasing management is maintained at all times.
13. Inputs and/or monitors employee time & pay records using an automated system. Ensures records are accurate each month.

SUPERVISORY RESPONSIBILITIES

Manages staff assigned to purchasing and contract administration. Is responsible for the overall direction, coordination, and evaluation of this unit. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

QUALIFICATIONS To perform this job successfully, an individual must be qualified to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE

Bachelors degree in Business Administration, Accounting, Public Administration or related field required from an accredited college or university and five years of experience performing procurement, preferably in a government agency and five years of demonstrated contract negotiation and management; including two years supervisory experience; or an equivalent combination of training and experience.

COMPREHENSION/COMMUNICATION SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence and procedure manuals. Ability to effectively present technical information in a manner easily understood by end users when responding to inquiries from employees, suppliers, the general public and the Board of Trustees. The duties and responsibilities of this position necessitate the use of a District provided cellular phone.

MATHEMATICAL SKILLS

Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions.

CERTIFICATES, LICENSES, REGISTRATIONS Valid Driver's License. It is the employee's responsibility to maintain all required certifications and licenses and to report any changes to the supervisor. CPPB or CPPO preferred but not required.

OTHER SKILLS OR ABILITIES

Excellent organizational, analytical, communication, customer service and problem-solving skills. Very good leadership and supervisory skills. Must be self-motivated and show a high level of initiative while working and managing a wide

spectrum of technologies, applications and projects; ability to establish and maintain good working relationships; ability to remain current on computer technology; to effectively present information to a broad range of user abilities; detail oriented with the ability to handle confidential information and prioritize work to meet schedules and deadlines; ability to deal with changing circumstances in a positive manner; ability to maintain composure when dealing with irate customers

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. In compliance with applicable disability laws, reasonable accommodations may be provided for qualified individuals with a disability who require and request such accommodations. Applicants and incumbents are encouraged to discuss potential accommodations with the employer.

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee is occasionally required to stand; walk; reach with hands and arms; climb or balance; and stoop, kneel, crouch, or crawl. The employee must frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, and ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally exposed to moving mechanical parts, outside weather conditions, and risk of electrical shock. The noise level in the work environment is usually moderate.

I have read and understand this explanation and job description.

Employee Signature: _____ Date: _____

Employee Name: _____

ATTACHEMENT 2 – Recommended Changes

Incline Village General Improvement District Job Description

Job Title: Contracts & Purchasing Manager
Job Number: 1226A
Salary Grade: 33
Department: Finance
Reports To: ~~General Manager~~ Assistant Director of Finance
FLSA Status: Exempt - Administrative
Prepared By: ~~B. Magee/M. Bandelin~~/E. Feore
Prepared Date: ~~10/01/2024~~12/27/2023
Approved By: ~~K. Crocker~~M. Bandelin
Approved Date: 01/10/24

SUMMARY

Under the general direction of the ~~General Manager~~ Assistant Director of Finance, this position is responsible for leadership, direction, plans, organizes, directs and organization; of administers the Incline Village General Improvement District's (IVGID) strategic sourcing and purchasing programs and is responsible for the negotiation and oversight of; negotiates program; supervises assigned personnel in purchasing and contract administration activities; partners with District management to negotiate and reviews review contracts for the District Board review and approval.

ESSENTIAL DUTIES AND RESPONSIBILITIES, not necessarily in order of priority, include the following. Assigned job tasks/duties are not limited to the essential functions.

1. Manages Procurement's (who/what is Procurement?) operating budget, including resource levels, salaries, expenses, and training.

~~1. Provides excellent customer service to customers and District partners and collaborators.~~

~~2. Manages, reviews~~ Reviews and administers District purchase orders and contracts, ensuring District compliance with applicable federal, state and District policies ~~local ordinances~~ relative to procurement and contracting.

Oversees the procurement processes to ensure the departments across the District have the resources needed to operate. This includes managing supplier relationships, approving purchase orders, and monitoring inventory levels.

~~Analyzing market trends and technologies to boost cost savings. Identify and implement cost-saving opportunities without sacrificing quality or service.~~

Builds strong relationships with suppliers and internal departments.

~~3. Reviews and signs bids, Request for Proposals (RFP), and Requests for Qualifications (RFQ) on behalf of the District, resolving disputes involving bid, RFP and contract issues.~~

~~4. Provides interpretation and advice for other District departments and venues regarding compliance with purchasing and contracting processes, procedures and laws.~~

Manages Supplier Bid Process, including: partnering

~~5. Receives and reviews purchase requisitions for accuracy and adherence to state or federal requirements, Special District requirements, and policies and procedures of the Finance Division.~~

~~6. Places orders with chosen vendors to ensure the timely, cost efficient acquisition and delivery of required commodities and services.~~

7. Partnering with applicable IVGID personnel in the preparation of to prepare, prepares bid documents with terms, conditions and specifications for products or services for publication; advertises request for bid or RFPs ~~RFP to attract~~

ATTACHEMENT 2 – Recommended Changes

~~likely suppliers~~; opens all bids submitted in a public forum; reviews and evaluates the merits of each bid in order to make recommendations for preferred suppliers ~~and best value to~~ the District management and Board.

~~4. Drafts~~Creates, assesses risk~~evaluates, negotiates and executes contracts, agreements ad MOU's by working closely with the Finance team to ensure financial obligations related to contract and purchasing management are met.~~

Creates and maintains IVGID's contract management system, internally

Ensures compliance with contract terms and the renewals of contracts, agreements and MOU's.

~~8. Crafts, evaluates, negotiates and executes a wide variety of contracts covering a range of transactions.~~
Establishes workflow related to specific contracts, including maintaining

~~9. Maintains records for correspondence and documentation in relation to established contracts, agreements and MOU's and those in progress. Creates and maintains a contract management system internally to establish workflow related to specific contracts.~~

~~58. Develops purchasing and manages Procurement policies and procedures~~procurement guidelines and standards for use in the administration of purchasing functions and activities.

~~9. Writes reports, recommendations and correspondence to address a variety of issues related to the timely and cost efficient procurement of goods and services for assigned classifications.~~

~~10. Partners with District management, legal advisors and, as necessary, members of the Board of Trustees to mitigate common contract management risks, such as financial, legal, and security risks.~~

~~10. Evaluates operational performance, reviews work methods and procedures, and~~ implements~~develops and implement~~ changes in work processes to enhance efficiency.

6. Ensures purchase requisitions are accurate and adhere to state or federal requirements, Special District requirements, and policies and procedures of

~~12. Working closely with the District Finance Division team, ensures financial obligations related to contract and purchasing management is maintained at all times.~~

~~13. 7. Inputs and/or monitors employee time & pay records using an automated system. Ensures records are accurate each month.~~

SUPERVISORY RESPONSIBILITIES

Manages staff assigned to Procurement~~purchasing~~ and contract administration. ~~Is responsible for the overall direction, coordination, and evaluation of this unit. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems. Responsible for the overall direction, coordination, and evaluation of the group. Carries out supervisory responsibilities in accordance with~~ the District organization's policies and applicable laws.

8. Develops Strategic Sourcing strategy to deliver maximum value and savings from District procurement and contracts expenditures

9. Provides interpretation and advice for other District departments and venues regarding compliance with purchasing and contracting processes, procedures and laws.

10. Manages Supplier Relationships to ensure the timely, cost efficient acquisition and delivery of required commodities and services.

ATTACHEMENT 2 – Recommended Changes

11. Partners with District management, legal advisors and, as necessary, members of the Board of Trustees to mitigate common contract management risks, such as financial, legal, and security risks.

~~QUALIFICATIONS~~—To perform this job successfully, an individual must be qualified to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

QUALIFICATIONS

EDUCATION/~~and/or~~ EXPERIENCE

- ~~Bachelors degree in~~ Supply Chain Management, Business Administration, Accounting, ~~Public Administration~~ or related field required from an accredited college or university
- ~~Five and five~~ years of experience performing Procurement~~procurement~~, preferably in a government agency
- ~~Five and five~~ years of demonstrated contract negotiation and management
- Demonstrated track record of delivering value and savings through sourcing and negotiating strategies
- ~~Two; including two~~ years supervisory experience; or an equivalent combination of training and experience.

CERTIFICATES, LICENSES, REGISTRATIONS

- ~~Valid Driver's License.~~
Ability to define problems, collect data, establish facts, and draw valid conclusions.
ISM or CPPO preferred but not required.

COMPREHENSION/COMMUNICATION SKILLS

- ~~Ability to read, analyze, and interpret~~ general business periodicals, professional journals, technical procedures, or governmental regulations.
- ~~Ability to write reports, business correspondence and procedure manuals.~~
- ~~Ability to effectively present technical information in a manner easily understood by end users when responding to inquiries from employees, suppliers, the general public and the Board of Trustees.~~
- ~~The duties and responsibilities of this position necessitate the use of a District provided cellular phone.~~

MATHEMATICAL SKILLS

- Excellent organizational, analytical, communication, customer service and problem-solving skills.
- Excellent Negotiation and Presentation skills

~~Ability to deal with (what did Ray intend here?)~~ apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

REASONING ABILITY

~~Ability to define problems, collect data, establish facts, and draw valid conclusions.~~

- ~~**CERTIFICATES, LICENSES, REGISTRATIONS** Valid Driver's License. It is the employee's responsibility to maintain all levels of an organization required certifications and licenses and to report any changes to the supervisor. CPPB or CPPO preferred but not required.~~

OTHER SKILLS OR ABILITIES

- ~~Excellent organizational, analytical, communication, customer service and problem-solving skills.~~
Demonstrated Very good leadership and supervisory skills.
- ~~Must be self-motivated and show a high level of initiative while working and managing a wide spectrum of technologies, applications and projects; ability to establish and maintain good working relationships; ability to remain current on computer technology; to effectively present information to a broad range of user abilities; detail oriented with the ability to handle confidential information and prioritize work to meet schedules and deadlines; ability to deal with changing circumstances in a positive manner; ability to maintain composure when dealing with irate customers~~
- Ability to establish and maintain good working relationships

ATTACHEMENT 2 – Recommended Changes

- Detail oriented with the ability to handle confidential information
- Ability to prioritize work to meet schedules and deadlines;
- Adaptable and flexible, showing ability to deal with changing circumstances in a positive manner
- Excellent conflict resolution skills

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. In compliance with applicable disability laws, reasonable accommodations may be provided for qualified individuals with a disability who require and request such accommodations. Applicants and incumbents are encouraged to discuss potential accommodations with the employer.

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee is occasionally required to stand; walk; reach with hands and arms; climb or balance; and stoop, kneel, crouch, or crawl. The employee must frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, and ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally exposed to moving mechanical parts, outside weather conditions, and risk of electrical shock. The noise level in the work environment is usually moderate.

The requirements listed above are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

I have read and understand this explanation and job description.

Employee Signature: _____ Date: _____

Employee Name: _____

**Incline Village General Improvement District
Job Description**

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Salary Grade: 33
Department: Finance
Reports To: General Manager
FLSA Status: Exempt - Administrative
Prepared By: E. Feore / K. Crocker
Prepared Date: 12/27/23 – Revised 10/1/24
Approved By: K. Crocker
Approved Date: 10/1/2024

SUMMARY

Under the general direction of the General Manager, this position is responsible for leadership, direction, and organization of the Incline Village General Improvement District’s (IVGID) strategic sourcing and purchasing programs and is responsible for the negotiation and oversight of contracts for the District.

ESSENTIAL DUTIES AND RESPONSIBILITIES, not necessarily in order of priority, include the following. Assigned job tasks/duties are not limited to the essential functions.

1. Manages Procurement’s operating budget, including resource levels, salaries, expenses, and training.
2. Manages, reviews and administers District purchase orders and contracts, ensuring District compliance with applicable federal, state and District policies relative to procurement and contracting.
3. Oversees the procurement processes to ensure the departments across the District have the resources needed to operate. This includes managing supplier relationships, approving purchase orders, and monitoring inventory levels.
4. Analyzes market trends and technologies to boost cost savings. Identifies and implements cost-saving opportunities without sacrificing quality or service.
5. Builds strong relationship with suppliers and internal departments.
6. Manages Supplier Bid Process, partnering with applicable IVGID personnel in the preparation of bid documents with terms, conditions and specifications for products or services for publication; advertises request for bid or RFPs; opens all bids submitted in a public forum; reviews and evaluates the merits of each bid in order to make recommendations for preferred suppliers and best value to the District.
7. Drafts, assesses risks, negotiates and executes contracts, agreements and MOUs by working closely with the Finance team to ensure financial obligations related to contract and purchasing management are met.
8. Creates and maintains IVGID’s contract management system. Ensures compliance with contract terms and the renewals of contracts, agreements and MOUs. Establishes workflows related to specific contracts, including maintaining records for correspondence and documentations in relation to established contracts, agreements and MOUs; ensures proper certification of insurance coverage is received and maintained as defined in the approved contract.
9. Develops and manages Procurement policies and procedures for use in the administration of purchasing functions and activities and oversees Districtwide compliance with District procurement card policies by cardholders.
8. Evaluates operational performance, reviews work methods and procedures and implements changes in work processes to enhance efficiency.

ATTACHMENT 3 – For Approval

9. Ensures purchase requisitions are accurate and adhere to federal, state and Special District requirements, and policies and procedures of the District.
10. Develops Strategic Sourcing strategy to delivery maximum value and savings from District procurement and contract expenditures.
11. Provides interpretation and advice for other District departments and venues regarding compliance with purchasing and contracting processes, procedures and laws.
12. Manages supplier relationships to ensure the timely, cost-efficient acquisition and delivery of required commodities and services.
13. Partners with District management, legal advisors and, as necessary, members of the Board of Trustees to mitigate common contract management risks, such as financial, legal, and security risks.
14. Manages staff assigned to procurement and contract administration and is responsible for the overall direction, coordination and evaluation of the group. Performs supervisory duties in accordance with the District's policies and applicable laws, including interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

QUALIFICATIONS

To perform this job successfully, an individual must be qualified to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION/EXPERIENCE

- Bachelor's degree in Supply Chain Management, Business Administration, Accounting or related field required from an accredited college or university.
- Five years of experience performing procurement duties, preferably in a government agency.
- Five years of demonstrated contract negotiation management.
- Demonstrated track record of delivering value and savings through sourcing and negotiating strategies.
- Two years' supervisory experience; or an equivalent combination of training and experience.

CERTIFICATES, LICENSES, REGISTRATIONS

- Valid Driver's License.
- ISM or CPPO preferred but not required.

COMPREHENSION/COMMUNICATION SKILLS

- Ability to read, analyze, and interpret professional journals, technical procedures, or governmental regulations.
- Ability to write reports, business correspondence and procedure manuals.
- Ability to effectively present technical information in a manner easily understood by end users when responding to inquiries from employees, suppliers, the general public and the Board of Trustees.
 - The duties and responsibilities of this position necessitate the use of a District provided cellular phone.

OTHER SKILLS OR ABILITIES

- Excellent organizational, analytical, communication, customer service and problem solving skills.
- Excellent negotiation and presentation skills.
- Excellent conflict resolution skills.
- Ability to define problems, collect data, establish facts and draw valid conclusions.
- Demonstrated leadership and supervisory skills.
- Must be self-motivated and show a high level of initiative while working and managing a wide spectrum of technologies, applications and projects.

ATTACHMENT 3 – For Approval

- Ability to establish and maintain good working relationships; adaptable and flexible, showing ability to deal with changing circumstances in a positive manner.
- Detailed oriented with the ability to handle confidential information.

PHYSICAL DEMANDS

The physical and mental requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of the job:

- Strength, dexterity, coordination, to use keyboard and video display terminal for prolonged periods.
- Strength and stamina to bend, stoop, sit, and stand for long periods of time.
- Dexterity and coordination to handle files and single pieces of paper; occasional lifting of files, stacks of paper or reports, references, and other materials. Some reaching for items above and below desk level.
- Some bending, squatting, and stooping to access files and records is necessary.
- The manual dexterity and cognitive ability to operate a personal computer using word processing and databases.
- The ability to interact professionally, communicate effectively, and exchange information accurately with all internal and external customers.
- Ability to appropriately handle stress and interact with others, including supervisors, coworkers, employees, and the public.
- Maintain regular and consistent punctuality and attendance. Light lifting (up to 25 pounds) is occasionally required.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Position functions indoors in an office type environment where most work is performed at a desk. Position may require occasional travel by car to carry out deliveries or pick up material. Work environment is generally clean with limited exposure to conditions such as dust, fumes, noise, or odors. Frequent interruptions to planned work activities occur.

I have read and understand this explanation and job description.

Employee Signature: _____ Date: _____

Employee Name: _____