

## **Draft Classification Standards – To Be Effective 10/01/2025**

### **Procurement Professional Series**

<b>Class Title</b>	<b>Class Code</b>	<b>Issue Date</b>	<b>FLSA</b>
<i>Procurement Professional I</i>	XXXX	XXXX	<i>Non-Exempt</i>
<i>Procurement Professional II</i>	XXXX	XXXX	<i>Non-Exempt</i>
<i>Procurement Professional III</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Procurement Professional IV</i>	XXXX	XXXX	<i>Exempt*</i>

#### **OVERVIEW:**

Positions classified within the Procurement Professional series are responsible for the procurement of goods, services, information technology, and construction for the university. Incumbents perform procurement-related duties within a centralized campus procurement department, work with specific delegation of procurement authority, and are agents of the university with respect to purchases made in accordance with state and federal regulations, as well as campus and CSU policies, procedures, and practices.

Positions are assigned to classifications within the series on the basis of the scope and complexity of procurement activities; degree of independence and judgement; experience, knowledge, skill, and ability required; degree of planning, analysis, and execution required by the position; impact and risk to the university; and nature of supervision received.

Positions perform tasks that may include but are not limited to: preparing invitations for bids and requests for proposals; sourcing products and suppliers; negotiating contracts; administering purchase agreements and contracts; maintaining supplier relationships; and ensuring compliance with state and federal regulations, policies, and procedures. Higher levels within the series build upon and include the knowledge and skill requirements and work assignments of lower levels within the series.

***Procurement Professional I*** – Utilizes professional procurement concepts and performs less complex procurement activities and analysis. Works on smaller projects or programs. Works within a limited delegated authority and assigned dollar limit. Works on low-risk, narrow-focused, and commodity/service-based purchases. Most assignments follow standard practices and procedures. Identifies problems and analyzes alternative options. Precedents may often be relied upon to determine solutions. Works with minimal supervision on regular assignments. Receives instructions and direct supervision on new and non-routine work.

***Procurement Professional II*** – Uses skills and professional knowledge to complete procurement assignments of moderate complexity where analysis of situations or data requires review of multiple procurement options. Works under delegated authority to make purchases within an assigned dollar limit. Negotiates terms and conditions, pricing, and deliverables. Conducts simple trend analyses with the intent to maximize competition. Researches cooperative agreements already in place. Exercises judgment within defined limits and practices to determine the most effective methodology to acquire a broad range of common goods and services. Works independently on day-to-day assignments with general supervision.

***Procurement Professional III*** – Works on moderate to complex procurement assignments, projects, and negotiations. Uses developed public procurement skills, knowledge, and experience and resolves a wide range of issues. Works within assigned dollar limits where analysis of situations, spending trends, or data requires a review of multiple procurement/sourcing options. Develops contracts of moderate complexity from inception to completion and administers terms and conditions. May be responsible for multi-department procurements. May have full responsibility for the procurement of technical and specialized commodities and services and major long-term contracts. Exercises sound judgment to determine the most effective methodology to acquire common goods and services. Receives minimal guidance on day-to-day work, with general direction provided on more complex or unique procurement assignments and projects.

\* This classification as outlined in this document meets the duties test of the Administrative Exemption. An employee's actual exemption status may differ based on salary rate and actual duties performed.

**Procurement Professional IV** – Completes complex procurement assignments. Independently performs complex data and trend analyses to gain strategic insights. Determines how to use resources to meet schedules and goals. Identifies risks and responds accordingly. Negotiates complex contracts from inception to completion and administers terms and conditions. May be responsible for multi-department and/or multi-campus procurements. Regularly oversees the completion of projects and initiatives of critical importance to the organization. May contribute to and influence campus policy and program development. Demonstrates judgment in selection of methods and techniques and makes independent procurement/sourcing decisions. Conducts assignments based on objectives. May provide work direction for other personnel or serve as a work lead.

### **DISTINGUISHING CHARACTERISTICS:**

This series is distinguished from other series by a primary responsibility for binding the university in contracts and procurement of goods, services, information technology and construction. The Procurement Professional performs work in the centralized office dedicated to campus procurement.

### **TYPICAL PROGRAMS, ACTIVITIES, AND CORE FUNCTIONS/DISCIPLINES (May include but are not limited to):**

- *Sourcing and Supplier Management* – Identifies, evaluates, and manages relationships with suppliers to ensure quality, reliability, and cost-effectiveness. Stays current with industry trends, market conditions, and emerging suppliers to enhance procurement strategies. Serves as the liaison between the supplier and campus stakeholders.
- *Purchasing and Ordering* – Oversees the purchasing process, including placing orders, approving purchases, and ensuring timely delivery. Prepares bid requests, reviews and analyzes proposals, and selects suppliers. Collaborates with internal teams to assess needs, manage inventory levels, and optimize supply chain processes. Assesses and mitigates risks related to supply chain disruptions and supplier reliability.
- *Negotiation and Contract Management* – Negotiates with vendors to secure the best possible terms and pricing for goods and services. Drafts, reviews, and manages supplier contracts to ensure compliance with terms and conditions.
- *Cost Management* – Analyzes spending and identifies opportunities for cost savings and efficiencies.
- *Compliance and Ethical Sourcing* – Stays informed about federal, state, and university policies related to procurement. Ensures procurement practices align with legal requirements, policies, regulations, and ethical sourcing principles.

### **PROCUREMENT PROFESSIONAL I**

Under direct supervision, performs entry-level technical and professional work within the procurement field including purchasing and analyzing within limited commitment authority; evaluating compliance of requests/purchases with procedures and policies; and identifying potential problems, issues, and inefficiencies. May be assigned less technical/ complex projects, informal bids, or request for quotes. Performs less complex assignments following detailed and established procedures. Work is regularly reviewed for adherence and compliance with policies and procedures.

#### ***Work assignments typically include some or all of the following:***

- Researches, prepares, and issues informal and routine invitations for bids and requests for quotes to the supplier community. Determines and reviews methods of acquisition.
- Reviews bids, contracts, and related documentation to verify accuracy and completeness. May analyze bids and make recommendations for contract award.
- Checks and reviews market sources and suppliers to ensure most cost effective and competitive pricing for the purchase of commodities and services.
- Conducts basic negotiations on price, terms, and delivery options.

- ◆ Supports the administration of contracts, agreements, or purchase orders. May make simple amendments to contracts.
- ◆ Maintains up-to-date relationships and customer service with suppliers and end users.
- ◆ Receives, reviews, and determines general compliance of policy and laws for informal solicitations and low complexity contracts, such as pricing and delivery.
- ◆ Evaluates non-contract and non-purchase order spend per campus procedures and university policy and communicates processes and procedures to stakeholders.
- ◆ Uses procurement technological systems to carry out duties.
- ◆ Creates reports for use in analysis.
- ◆ May conduct risk analysis.

## **MINIMUM QUALIFICATIONS:**

### ***Knowledge and Skill:***

- ◆ Basic knowledge of generally accepted procurement principles.
- ◆ General knowledge of pricing, cost analysis and risk assessment methods and the ability to apply them.
- ◆ Ability to learn, interpret, and apply policies and procedures relating to procurement activities.
- ◆ Skill in performing accurate mathematical computations.
- ◆ Demonstrated communication and interpersonal skills to effectively present information to team members and stakeholders.
- ◆ Ability to understand and follow written and oral instructions.
- ◆ Ability to write reports, business correspondence, and procedures.
- ◆ Ability to clearly communicate information both orally and in writing.
- ◆ Ability to effectively present information and respond to questions including requesters, suppliers, and the general public.
- ◆ Organizational skills to plan and prioritize work.
- ◆ Skill in establishing and maintaining effective working relationships with all personnel, supervisors, and suppliers.
- ◆ Ability to stay current in procurement trends.
- ◆ Ability to address and solve problems from a broad business perspective.
- ◆ Computer skills to appropriately use technology and relevant software packages as required.
- ◆ Ability to work independently and as part of a team with a customer service-oriented approach.
- ◆ Flexibility to adapt to changing priorities and deadlines.

### ***Experience and Education:***

Equivalent to a bachelor's degree in a related field. Related education and/or experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis.

## **PROCUREMENT PROFESSIONAL II**

Under general supervision, performs a variety of professional procurement activities. Incumbents perform moderately complex procurements that require analysis and tend to specialize in particular commodities or services. Independently conducts formal bidding and routine negotiations for procurements. Proactively recommends procurement methods and utilizes systems and technology to assist with procurements. May develop contracts of limited complexity for the purchases of supplies and services. Evaluates and recommends procedure and process changes. Works independently on most day-to-day assignments with general supervision on new assignments or projects to ensure alignment with objectives. Handles multiple work priorities and is accountable for own work results.

### ***In addition to duties performed by the Procurement Professional I, the Procurement Professional II typically performs the following duties:***

- ◆ Prepares informal and formal invitations for bids and requests for proposals.
- ◆ Compiles department and division requests for similar products and services.
- ◆ Reviews and prioritizes requisitions as well as evaluates and assists with proposed specifications.
- ◆ Schedules, receives, and analyzes bids as well as recommends contract award. Conducts risk assessments.
- ◆ Evaluates suppliers, goods, and services through bids and proposals and selects most advantageous supplier for the procurement.

- ◆ Researches existing needs in order to match current market availability.
- ◆ Researches potential new suppliers for goods and services.
- ◆ Reviews new industry products and services and informs applicable campus end users.
- ◆ Performs moderately complex negotiations, including legal terms, price, payment terms, and delivery options.
- ◆ Processes contracts or purchase orders while monitoring supplier compliance with terms and conditions of the purchase order, including determining both responsiveness and responsibility with requirements stated in the solicitation.
- ◆ May be responsible for annual or multi-year contracts in collaboration with management.
- ◆ Serves as liaison between the supplier, Procurement Department, and other departments and divisions.
- ◆ Resolves issues from users, suppliers, and the public.
- ◆ Provides recommendations for process improvements.
- ◆ Participates in training stakeholders on processes and procedures.
- ◆ Creates reports and conducts data analyses.

#### **MINIMUM QUALIFICATIONS:**

***In addition to Procurement Professional I knowledge and skill requirements, work assignments typically require:***

- ◆ Working knowledge of current principles, statutes, regulations, policies, procedures, practices, methods of procurement, contract delivery methods, and contract administration activities. Public procurement knowledge is preferred.
- ◆ General knowledge of principles and practices used in the development of contracts, contract administration, and contract law.
- ◆ Working knowledge of pricing, cost analysis, and principles and practices used in accounting.
- ◆ Working knowledge of benchmarking, budgeting, and cost estimating.
- ◆ Knowledge of equipment, materials, and services required by a public or large organization.
- ◆ Skill in evaluating and comparing the product specifications, contract details, and cost elements of a bid or proposal.
- ◆ Demonstrated ability to perform pricing and cost analysis.
- ◆ Ability to analyze and provide solutions.
- ◆ Skill and experience in cost-reduction techniques.
- ◆ Ability to research and compare product, quality, performance, and options.
- ◆ Skill in performing moderately complex negotiations, which may include, but not limited to, legal terms.
- ◆ Strong communication and interpersonal skills to present ideas and work effectively in a diverse environment.
- ◆ Ability to prioritize, schedule, and undertake concurrent work assignments.
- ◆ Strong organizational skills to plan, organize, and prioritize multiple projects.
- ◆ Ability to effectively use procurement software and tools as well as applicable systems and applications in analysis, research, and reporting activities and projects.

#### ***Experience and Education:***

Equivalent to a bachelor's degree in a related field and two years of relevant experience or one year as a CSU Procurement Professional I. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

#### **PROCUREMENT PROFESSIONAL III**

Working independently under general direction, performs moderate to complex procurements, which may be unique in nature, for supplies and professional services conducted in accordance with applicable federal, state, and local laws, ordinances, rules, and regulations. Demonstrates advanced discernment in selecting methods and techniques for obtaining solutions. Conducts data analyses and benchmarking to support procurement/sourcing strategy decisions. Establishes annual and multi-year contracts for the purchase of supplies and services. Conducts risk analysis and understands the repercussions of contract and procurement decisions. Negotiates price, payment schedule, provisions, terms, and conditions. Provides recommendations on policies, tools, and procedures for the campus and systemwide and participates in departmental decisions for implementation. Decision-making is based on procurement best practices; substantial experience; relevant regulations; guidelines

and practices; and university policies and protocols. Work is focused on ensuring alignment with overall objectives. Handles multiple work priorities and may provide lead work direction with accountability for results.

***In addition to duties performed by the Procurement Professional II, the Procurement Professional III typically performs the following duties:***

- ◆ Prepares and facilitates invitations for bids and technical formal requests for proposals with complex scopes of work, including all related research and value analysis.
- ◆ Confers with departments regarding requirements, specifications, quantity, quality, and delivery as well as recommends alternatives that would result in greater value.
- ◆ Coordinates and facilitates all activities related to the bid process through the award and implementation of the project or receipt of good/services. Activities may include advertising, supplier inquiries, bid walks, bid/proposal receipt, coordination of the evaluation process and committee, negotiations, process management, change orders, and contract closeout.
- ◆ Reviews calculations and provides projection analysis for total cost of ownership.
- ◆ Identifies potential supplier/contractor sources.
- ◆ Researches market sources and suppliers to locate and ensure most cost effective and competitive pricing for the purchase of supplies, equipment, and services.
- ◆ Negotiates, develops, and issues contracts and recommends most effective procurement method.
- ◆ Provides feedback on spending, potential cost savings, and efficiencies to assigned clients.
- ◆ Has full contract responsibility to amend, exercise options, and terminate a contract.
- ◆ Performs contract administration, including serving as a liaison between suppliers and departments, ensuring compliance with contract terms and conditions and grant requirements, and negotiating contract amendments, extensions, and change orders.
- ◆ Responsible for more complex annual and multi-year contracts often requiring higher delegation of authority that may involve significant engagement with vendors.
- ◆ Evaluates, interprets, and communicates procurement policies, procedures, and risk associated with procurement activities.
- ◆ Identifies and implements process improvement opportunities and delivers process and procedure training to stakeholders.
- ◆ Reviews, monitors, and performs follow-up of bids and purchases to ensure continued compliance with contracted suppliers and provides direction and mitigation for non-compliance.
- ◆ May provide lead work direction and mentorship to less experienced staff.

**MINIMUM QUALIFICATIONS:**

***In addition to Procurement Professional II knowledge and skill requirements, work assignments typically require:***

- ◆ Advanced knowledge of current principles, statutes, regulations, policies, procedures, practices, and methods of procurement, through a variety of procurement delivery methods and contract administration.
- ◆ Thorough knowledge and understanding of computations and statistics used in analytics and/or cost and price analysis.
- ◆ Working knowledge of contract law.
- ◆ Advanced knowledge of total cost of ownership accounting and analysis.
- ◆ General knowledge of corporate financial statements and assessing financial responsibility.
- ◆ Demonstrated competence in applying advanced judgment to resolve difficult and complex problems and issues.
- ◆ Ability to effectively read, interpret, explain, and properly apply rules, regulations, laws, policies, and procedures.
- ◆ Skill in researching and preparing complex specifications and scopes of work for solicitations and contract documents, based on input from the requestor.
- ◆ Demonstrates the ability to problem solve and applies sound judgement in contract and procurement methods.
- ◆ Skill in negotiating contracts.
- ◆ Ability to make difficult decisions and award contracts impartially and objectively.
- ◆ Advanced communication and interpersonal skills, including political acumen to build partnerships and communicate effectively across all employee groups in a diverse environment. Ability to effectively represent the university, engage and collaborate with internal and external stakeholders as well as university leadership.

- ◆ Advanced analytical and organizational skills to prioritize and manage the successful completion of projects within time and budget constraints.

***Experience and Education:***

Equivalent to a bachelor's degree in a related field and four years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

***Certification:***

Completion of a professional procurement certification is preferred.

**PROCUREMENT PROFESSIONAL IV**

Oversees and facilitates all aspects of the most complex CSU procurements. Creates large, campus-oriented, long-term, and high-risk agreements which may apply to multiple departments. Responsible for strategic procurement planning and sourcing resulting in development and implementation of annual or multi-year contracts. Develops specifications, establishes evaluation criteria and implementation procedures, and facilitates award decisions. Coordinates with campus departments that could be directly or functionally impacted by the contracts. Selects appropriate methods and recommends solutions and best practices in the contract process. Assignments are typically received in the form of goals and objectives. Working independently with minimal supervision, performs highly complex procurement work. Serves as a technical expert and collaborates with management in the development and implementation of new strategies, programs, processes, and practices. Uses expertise to provide expert advice and guidance across the university. Problems are highly complex, and solutions may require the creation of new, unprecedented procedures. Decision-making often requires integration and interpretation of organizational policies and protocols, professional best practices, financial and organizational impact on programs, and persuasion and negotiation with senior management. Assesses, prioritizes, and recommends program changes. Work is performed without appreciable direction and often requires a high degree of persuasion and leadership. Functions with a high degree of autonomy.

***In addition to duties performed by the Procurement Professional III, the Procurement Professional IV typically performs the following duties:***

- ◆ Conducts multi-step procurement, solicitations, request for information requirements, and analysis for complex projects.
- ◆ Strategically sources requirements to leverage spend and demand.
- ◆ Researches market sources and suppliers to locate and ensure the best value purchase of supplies and services.
- ◆ Analyzes supplier performance and stability.
- ◆ Conducts negotiations with suppliers on proposals, which may include requests for best and final offers of submitted proposals, contracts, contract claims, and complex legal terms.
- ◆ May be involved in long-term negotiations relating to complex contract provisions.
- ◆ Monitors and performs contract administration to ensure that contractors are performing in accordance with the terms and conditions of their contracts.
- ◆ Conducts periodic business reviews for large and/or complex contracts.
- ◆ Works with a variety of clients, funding sources, and public-private partnership agreements.
- ◆ Builds and maintains relationships with suppliers, systemwide professionals, and management.
- ◆ Ensures compliance with legislative mandates, systemwide initiatives, and procurement policies and procedures. Identifies and implements process improvements.
- ◆ Develops, creates, and conducts procurement training to internal and external stakeholders including creation of guides, manuals, and other documents relating to procurement processes and procedures.
- ◆ May be required to review new laws and regulations for impact on the university's goals.
- ◆ Independently conducts data analyses to support procurement, sourcing strategy, and business decisions.
- ◆ Creates and oversees escrow accounts and assists in the processing of claims when needed.
- ◆ Conducts procurement activities that routinely involve independent judgment, as well as the identification, assessment, analysis, and resolution of issues.
- ◆ Leads strategic procurement projects and may work on projects of critical importance for the campus, multiple campuses, and/or the CSU system.

- ◆ Provides lead work direction, guidance, and mentorship to procurement professionals.

**MINIMUM QUALIFICATIONS:**

***In addition to Procurement Professional III knowledge and skill requirements, work assignments typically require:***

- ◆ Expert knowledge of current principles, statutes, regulations, policies, procedures, practices, and methods of procurement, including governmental procurement and supply-chain management.
- ◆ Comprehensive knowledge of contract law, preferably public contract law.
- ◆ Expert knowledge of negotiations, price and cost analysis, and strategic sourcing.
- ◆ Expert analytical and organizational skills to organize, prioritize and manage the successful completion of large, complex, and strategic procurements.
- ◆ Expert communication and interpersonal skills to effectively represent the university, collaborate, as well as persuade internal and external stakeholders and university leadership.
- ◆ Advanced ability to conduct complex negotiations, price and cost analysis, strategic sourcing, forecasting, and spend analysis.
- ◆ Ability to assess financial responsibility and stability.
- ◆ Ability to plan and serve on a negotiating team and proven skill in negotiation strategy.
- ◆ Ability to understand and explain contract language and provisions.
- ◆ Ability to lead and oversee processes, problem solve, strategize, schedule, analyze, and plan.
- ◆ Thoroughly skilled in project management and/or program administration.

***Experience and Education:***

Equivalent to a bachelor's degree in a related field and five years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis. Professional certifications in procurement may be required for some positions.

***Certification:***

Completion of some professional procurement certification is preferred. Completion of a university level Extended Studies Certificate in procurement, contract management, supply management or equivalent course of study is preferred.