STATE OF OHIO (DAS) CLASSIFICATION SPECIFICATION	**CLASSIFICATION SERIES** Sourcing	**SERIES NUMBER** 6451
	MAJOR AGENCIES All Agencies	**EFFECTIVE** DRAFT

SERIES PURPOSE

The purpose of the sourcing occupation is to analyze agency's need & plan, find, evaluate, & contract with suppliers of goods & services, & ensure supplier performance.

GLOSSARY – the terms below are to be interpreted as follows wherever they appear in the classification specification:

BI – Business Intelligence reporting module of Ohio Administrative Knowledge System

Controlling Board – comprised of the Director of the Office of Budget & Management, or his or her designee, & six members of the Ohio General Assembly. The board provides legislative oversight over certain capital & operating expenditures by state agencies & has approval authority over various other state fiscal & purchasing activities. The board is a mechanism for handling certain limited day-to-day adjustments needed in the state budget.

CRP – Community Rehabilitation Program

CTV – Complaint to Vendor

DAS – Ohio Department of Administrative Services

ERP – Enterprise Resource Planning system

FIN – Financials module of Ohio Administrative Knowledge System

GDC – General Distribution Contracts

LDC – Limited Distribution Contracts

MBE/EDGE – Minority Business Enterprise/Encouraging Diversity, Growth & Equity

OAKS – Ohio Administrative Knowledge System

OBM – Ohio Office of Budget & Management

OFCC – Ohio Facilities Construction Commission

OPI – Ohio Penal Industries

OOD – Opportunities for Ohioans with Disabilities

OSS – Ohio Office of Shared Services

PO – Purchase Order

Sourcing Lifecycle – identifying need, developing specifications, identifying options, selecting suppliers, establishing contracts, & monitoring performance

UNSPSC – United Nations Standard Products & Services Code

Job duty, knowledge, skill, & ability statements at a lower-level are understood to be able to be performed at any higher level.

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Sourcing Associate	64511	27	DRAFT

CLASS CONCEPT
The entry level class works under immediate supervision & requires some knowledge of sourcing lifecycle in order to support agency's sourcing function by soliciting quotes, placing orders, & tracking order status.

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Sourcing Analyst	64512	28	DRAFT

CLASS CONCEPT
The first full performance level class works under general supervision & requires considerable knowledge of sourcing lifecycle in order to solicit & evaluate proposals, make recommendations & monitor supplier performance for a range of routine, established, customary requirements.

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Senior Sourcing Analyst	64513	31	DRAFT

CLASS CONCEPT
The second full performance level class works under general supervision & requires considerable knowledge of sourcing lifecycle in order to solicit & evaluate proposals, make recommendations & monitor supplier performance where the need is not customary & the specifications must be developed where none exist.

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Sourcing Planner	64514	33	DRAFT

CLASS CONCEPT
The advanced level class works under direction & requires thorough knowledge of sourcing lifecycle in order to independently or as a lead worker (i.e., provide work direction & training) research, evaluate & plan a comprehensive portfolio of contracts & purchasing based on past performance, future needs & strategic direction.

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Sourcing Supervisor	64515	14	DRAFT

CLASS CONCEPT
The supervisory level class works under general direction & requires thorough knowledge of sourcing lifecycle in order to supervise sourcing staff, lead systematic continuous improvement & assure the performance of the supply base.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Sourcing Associate	64511	14	DRAFT	27

JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

1. Supports agency's sourcing function by soliciting quotes, placing orders, & tracking order status:
   - Comparison shops in ERP electronic catalog shopping, retail outlets, &/or against established state contracts
   - Compares prices, specifications, availability, & delivery dates to determine best fit & best price among potential suppliers
   - Verifies shipments, reconciles with orders, & follows up where needed
   - Contacts suppliers to schedule or expedite deliveries & to resolve shortages, missed or late deliveries, &/or other problems
   - Distributes quotes to requestor
   - Determines if supplier has a Finding for Recovery or is listed on the federal system for award management (e.g., checks website, prints & documents results)
   - Determines if chosen supplier is in ERP system (e.g., OAKS), & where needed coordinates vendor registration
   - Sends supplier W-9 Packet with vendor forms & tax information request
   - Places &/or corrects orders against mandatory use contracts (e.g., OPI, GDC, LDC, agency contracts)
   - Refers supplier to OSS to establish OAKS self-service & training

2. Creates &/or processes requisitions & purchase orders following established contract provisions:
   - Enters &/or corrects requisitions, & follows up where needed
   - Dispatches &/or corrects purchase orders, tracks status, & follows up where needed
   - Purchases goods & services with payment card
   - Contacts supplier by phone, online, or in person
   - Provides payment card information & obtains receipt
   - Completes &/or corrects payment card logs & routes for approval & payment according to agency procedures

3. Validates purchase requests:
   - Determines proper UNSPSC code
   - Follows up with requestor & supplier where needed
   - Corrects minor issues where needed, & routes purchase requests according to agency procedures
   - Determines proper financial account codes
   - Determines if established inventory levels are met
   - Validates mandatory use compliance according to agency procedures

4. Performs administrative functions:
   - Responds to requestor & supplier inquiries regarding status
   - Maintains sourcing files & validates for completeness according to agency standards & procedures
   - Prepares predefined administrative reports
   - Obtains asset profile ID from ERP system (e.g., OAKS)

MAJOR WORKER CHARACTERISTICS

Knowledge of office practices & procedures; sourcing principles; state & agency sourcing policies, procedures & regulations*; ERP systems* (e.g., OAKS FIN). Skill in operation of calculator; operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. Ability to deal with problems involving several variables within familiar context; sort items into categories according to established method; maintain accurate records; calculate fractions, decimals & percentages; gather, collate & classify information about data, people or things; answer routine telephone inquiries from vendors &/or internal agency customers.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT
12 mos. exp. or 12 mos. trg. in purchasing/procurement/sourcing.

-Or completion of 1 yr. technical certificate in logistics, supply chain management, strategic procurement or other sourcing related subject.

-Or completion of short term certificate in logistics, supply chain management, strategic procurement or other sourcing related subject; 6 mos. exp. or 6 mos. trg. in purchasing/procurement/sourcing.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING & DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT
Not applicable.

UNUSUAL WORKING CONDITIONS
May require travel; may be required to work long or unusual hours during peak operational periods.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Sourcing Analyst	64512	14	DRAFT	28

JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

1. Solicits & evaluates proposals, makes recommendations & monitors supplier performance for a range of routine, established, customary requirements:
   - Receives & opens formal bids & proposals in accordance with established procedures
   - Arranges delivery of samples & submissions from potential suppliers to evaluators
   - Interviews vendors, checks references, &/or visits suppliers' plants & distribution centers to examine, learn about, & evaluate products, services, prices, performance, & capabilities
   - Conducts routine evaluation process of multiple samples & submissions from potential suppliers
   - Evaluates suppliers based on price, quality, selection, service, support, availability, reliability, production & distribution capabilities, & the supplier's reputation & history
   - Compiles information for Release & Permit &/or Controlling Board review & approval
   - Responds to follow-up requests from DAS & OBM to assist in disposition
   - Tracks status & follows up where needed
   - Works with requestor to establish specifications where products or services have multiple attributes that must satisfy a range of routine, established, customary requirements
   - Examines prepared description/specification of the need from program area & analyzes the need to determine proper level of detail is provided to be able to source good or service
   - Analyzes price proposals, financial reports, & other data & information to determine reasonable prices for expected scope, & to balance specifications, projected cost, & market availability to scope best fit
   - Verifies that goods & services meet specifications
   - Initiates vendor performance resolution
   - Researches & resolves routine customer & supplier disputes where parties do not agree regarding order status, changes, or cancellations
   - Creates routine requests for proposals for response by potential suppliers
   - Coordinates with requestor according to agency procedures to initiate formal CTV
   - Works with requestor to understand & scope need, including time & cost constraints of procurement engagement & other baseline expectations

2. Reviews, distributes & monitors requisitions, purchase orders & contracts:
   - Makes recommendations concerning contract proposals & contract amendment proposals according to agency procedures
   - Tracks contract status, controls contract versioning, & follows up where parties are unresponsive
   - Issues purchase orders for transactions outside of automated ERP systems
   - Distributes contracts & amendments to requestor & supplier
   - Obtains & applies proper financial codes (e.g., for split & proportional funding)

3. Identifies potential sources for goods & services:
   - Provides mandatory use & compliance review that requires subjective interpretation &/or application (e.g., MBE/EDGE, OPI, OOD, CRP, OSS)
   - Reviews catalogs, industry periodicals, directories, trade journals, & Internet sites, & consults with other department personnel to locate source options for goods & services
   - Customizes terms & conditions to fit specific needs & specifications
   - Creates supplier evaluation methods based on specifications fit, price, quality, selection, service, support, availability, reliability, production & distribution capabilities, & the supplier's reputation & history
   - Posts & distributes opportunities to potential suppliers according to policies & procedures
   - Coordinates responses to solicitation questions with requestor & legal counsel
   - Coordinates travel arrangements including flights, hotels, & ground transportation
   - Researches flight or hotel availability (e.g., determines the best available price that meets traveler & agency needs & requirements)

MAJOR WORKER CHARACTERISTICS

Knowledge of public relations*; sourcing principles; state & agency sourcing policies, procedures & regulations*, ERP systems* (e.g., OAKS FIN). Skill in operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. Ability to define problems, collect data, establish facts & draw valid conclusions; gather, collate & classify information according to established method; calculate fractions, decimals & percentages; write routine business correspondence & reports following standard procedures; identify noncompliance & formulate response; give verbal instructions associated with sourcing procedures; develop & maintain good rapport with internal agency customers & vendors.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT

Completion of associate core program in public or business administration, purchasing/procurement, materials management, contracting, acquisition management, logistics, strategic procurement, purchasing management, supply chain management or other sourcing related field.

-Or 18 mos. exp. or 18 mos. trg. in purchasing/procurement/sourcing.

-Or 6 mos. exp. as Sourcing Associate, 64511.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING & DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT

Not applicable.

UNUSUAL WORKING CONDITIONS

May require travel; may be required to work long or unusual hours during peak operational periods.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Senior Sourcing Analyst	64513	14	DRAFT	31

JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

1. Solicits & evaluates proposals, makes recommendations & monitors supplier performance where the need is not customary & the specifications must be developed where none exist (e.g., construction, intellectual property agreements, third-party managed services, solutions-based proposals):
   - Works with requestor &/or subject matter experts to establish specifications where products or services have multiple complex attributes & multiple deliverables
   - Designs & coordinates supplier prequalification tools & methods
   - Drafts complex analysis results & awards recommendation with rationale
   - Establishes acceptance & payment expectations & schedule for contracts with multiple deliverables &/or multiple phases
   - Coordinates with requestor & supplier to resolve cost overrun issues

2. Researches, analyzes, & makes recommendations regarding requisitions, purchase orders & contracts:
   - Evaluates & makes recommendations concerning proposed exceptions to terms or scope & proposed improvements over what was requested
   - Participates in contract negotiations with legal office, requestor & supplier
   - Provides market research & evaluation of balancing interests to aid in settling contract agreement
   - Establishes project plan pacing & scope
   - Identifies, contracts with, &/or works with subject matter experts to properly document need, & project timeline for developing specifications, risks, market strategy, & letting & evaluating opportunity
   - Determines cost projections & projected spending burn rate & sources for use in cost/benefit analysis, project budget tracking, allotment planning, & acceptance/payment modeling
   - Assesses projections with requestor & fiscal office
   - Recommends policies, procedures & improvements for sourcing practices

3. Designs & coordinates potential sources for goods & services:
   - Designs sourcing requirements across multiple preference programs &/or subcontractor preference programs
   - Conducts pre-proposal market interviews
   - Designs & coordinates competitive request for information processes, evaluates responses & formulates best approach to fit needs & constraints
   - Establishes vendor qualification & performance mechanisms (e.g., prime & subcontractor, prequalification, performance measures, deliverable acceptance) based upon market understanding & capability
   - Compares similarly-situated procurements of other jurisdictions (e.g., contacts other states & political jurisdictions; conducts interviews & collects information; evaluates similar proposals of other jurisdictions)

MAJOR WORKER CHARACTERISTICS

Knowledge of sourcing principles; state & agency sourcing policies, procedures & regulations*; public relations; contracts; ERP systems* (e.g., OAKS FIN). Skill in operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. Ability to define problems, collect data, establish facts & draw valid conclusions; understand technical manuals & verbal instructions associated with sourcing procedures; use statistical analysis; proofread technical specifications, recognize errors & make corrections; identify noncompliance & formulate response; gather, collate & classify information about data, people or things; write business correspondence or communications reflecting sourcing procedures; develop & maintain good rapport with internal agency customers & vendors.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT

Completion of undergraduate core program in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 6 mos. exp. or 6 mos. trg. in purchasing/procurement/sourcing.

-Or 30 mos. exp. or 30 mos. trg. in purchasing/procurement/sourcing.

-Or 12 mos. exp. as Sourcing Analyst, 64512.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING & DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT

Not applicable.

UNUSUAL WORKING CONDITIONS

May require travel; may be required to work long or unusual hours during peak operational periods.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Sourcing Planner	64514	14	DRAFT	33

JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

1. Independently or as lead worker (i.e., provides work direction & training) researches, evaluates & plans a comprehensive portfolio of contracts & purchasing based on past performance, future needs & strategic direction:
   - Reviews records of items purchased, costs, deliveries, product performance, & inventories, & improves specifications where needed
   - Conducts supply chain market research
   - Monitors & reviews use, history & trending of individual suppliers, & identifies where incumbent suppliers should be replaced or competed across portfolio of contracts
   - Tracks & reviews performance & performance lapses across portfolio of contracts
   - Identifies options for repeated performance lapses of particular suppliers holding multiple contracts
   - Tracks & reviews CTV, outcomes & suits across portfolio of contracts
   - Records contract terms & renewal options
   - Surveys market conditions, historical spending trends, price trends
   - Monitors & responds to changes affecting supply & demand
   - Reviews sourcing history (e.g., travel, preference programs, information technology) & forecasts trends to identify opportunities to consolidate buying power & negotiate more favorable terms & costs

2. Builds contract portfolio across multiple program areas:
   - Confirms portfolio meets the needs of program areas
   - Contacts other government offices with similar needs to standardize specifications, combines buying power & schedules, & establishes cooperative agreements across contract portfolio
   - Determines cost projections across contract portfolio, identifies cost savings & avoidance targets, & establishes cost control & reduction plan
   - Evaluates use records & inventory levels & trending of stock to develop strategic purchasing programs that facilitate improved supply chain delivery & cost reduction

3. Monitors portfolio & makes adjustments in conformance with policy changes (e.g., federal, state, agency):
   - Tracks & reviews use of terms, modification of terms, & exceptions to terms
   - Identifies plans & evaluates term improvements with legal counsel
   - Plans & improves planned use of preference programs across contract portfolio in accordance with policies & procedures factoring need, availability, performance, & success
   - Identifies replacement approaches to preferences where needed
   - Coordinates findings & supplier experiences with DAS & other agencies using supplier
   - Reviews performance expectations & results across contract portfolio, & establishes improvements based upon market availability & best practices
   - Reviews competition expectations & results across contract portfolio, & establishes improvements
   - Establishes comprehensive contracting schedule across contract portfolio
   - Maintains & evaluates records of items purchased, costs, deliveries, product performance, & inventories
   - Defines & creates complex analyses & benchmark reports across portfolio of contracts

MAJOR WORKER CHARACTERISTICS

Knowledge of sourcing principles; state & agency sourcing policies, procedures & regulations*; public relations; employee training & development*; contracts; ERP systems* (e.g., OAKS FIN). Skill in operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. Ability to define problems, collect data, establish facts & draw valid conclusions; understand technical manuals & verbal instructions associated with sourcing procedures; proofread technical specifications, recognize errors & make corrections; identify noncompliance & formulate response; use statistical analysis; gather, collate & classify information about data, people or things to forecast & plan; write business correspondence or communications reflecting sourcing procedures; develop & maintain good rapport with internal agency customers & vendors.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT

Completion of graduate core in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 6 mos. exp. or 6 mos. trg. in purchasing/procurement/sourcing.

-Or completion of undergraduate core in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 18 mos. exp. or 18 mos. trg. in purchasing/procurement/sourcing.

-Or 42 mos. exp. or 42 mos. trg. in purchasing/procurement/sourcing to include exp. in performing spend analysis, developing sourcing strategy & evaluating vendor performance.

-Or 12 mos. exp. as Senior Sourcing Analyst, 64513.

-Or 24 mos. exp. as Sourcing Analyst, 64512.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING & DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT

Not applicable.

UNUSUAL WORKING CONDITIONS

May require travel; may be required to work long or unusual hours during peak operational periods.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Sourcing Supervisor	64515	EX	DRAFT	14

JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

1. Supervises sourcing staff:
    - Directs & coordinates agency strategic sourcing practices
    - Oversees the monitoring of supplier & agency performance, & the identification & resolution of performance issues
    - Reviews & approves methods, templates, performance targets, sourcing schedules, &/or agreements in accordance with agency procedures & coordinates with program areas
    - Establishes, implements & monitors goals, objectives & performance metrics
    - Approves statistical reports & financial statements for distribution
    - Coaches & develops staff
    - Establishes work unit procedures

2. Develops & implements reports & compliance measures:
    - Prepares periodic reporting to senior management
    - Reviews proposed legislation &/or policy changes to determine financial impact &/or establishes sourcing procedures in line with legislative/policy requirements
    - Evaluates, develops & recommends policy updates
    - Oversees resolution to projected &/or actual missed performance targets
    - Identifies & changes contract performance measures

3. Performs other related sourcing duties:
    - Prepares, reviews & recommends Controlling Board, Release & Permit, waiver requests
    - Responds to inquiries from internal & external sources
    - Provides guidance & training to suppliers & agency program personnel
    - Plans & schedules sourcing events with agency program personnel
    - Establishes cooperative sourcing needs & plans sourcing events with other agencies, DAS, OFCC
    - Establishes agency use of preference programs

MAJOR WORKER CHARACTERISTICS

Knowledge of sourcing principles; supervisory principles & techniques*; state & agency sourcing policies, procedures & regulations*; public relations; employee training & development*; contracts; ERP systems* (e.g., OAKS FIN). Skill in operation of electronic devices (e.g., computer, tablet, cell phone); applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. Ability to define problems, collect data, establish facts & draw valid conclusions; understand technical manuals & verbal instructions associated with sourcing procedures; proofread technical specifications, recognize errors & make corrections; identify noncompliance & formulate response; use statistical analysis; gather, collate & classify information about data, people or things to forecast & plan; write business correspondence or communications reflecting sourcing procedures; develop & maintain good rapport with internal agency customers & vendors; establish friendly atmosphere as unit supervisor.

(*)Developed after employment.

COMPETENCIES

Resolving Conflicts and Negotiating with Others
Estimating the Quantifiable Characteristics of Products, Events or Information
Judging the Qualities of Objects, Services, or People

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT

Completion of graduate core in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 18 mos. exp. or 18 mos. trg. in purchasing/procurement/sourcing.

-Or completion of undergraduate core in public or business administration, purchasing, materials management, contracting, acquisition management or logistics, supply chain management, operations management or other sourcing related field; 30 mos. exp. or 30 mos. trg. in purchasing/procurement/sourcing.

-Or 54 mos. exp. or 54 mos. trg. in purchasing/procurement/sourcing to include exp. in performing spend analysis, developing sourcing strategy & evaluating vendor performance.

-Or 12 mos. exp. as Sourcing Planner, 64514.

-Or 24 mos. exp. as Senior Sourcing Analyst, 64513.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING & DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT
Not applicable.

UNUSUAL WORKING CONDITIONS
May require travel; may be required to work long or unusual hours during peak operational periods.