

YUKON UNIVERSITY
POSITION DESCRIPTION

PART I - IDENTIFYING DATA

Position Number: YC1237
Position Title: Procurement Officer
Incumbent: Vacant

Headquarters: Whitehorse
Supervisor's Name: Kim Walchuk
Supervisor's Title: Manager, Procurement

and

Contracts

Division: Finance and Administrative Services.

Date JD Completed: April 2024

PART II - SUMMARY (broad statement of why position exists)

The Procurement Officer provides effective financial and procurement support to the Manager of Procurement and Contracts, the Manager of Finance, internal clients and divisions, and external vendors and contractors. He/ she will process day-to-day procurement and financial transactions, to ensure the Finance team maintains the highest operational and compliance standards as required by legislation and YukonU's policies, procedures and processes.

A. Duties and Responsibilities

1. Major Function - the most important activity or responsibility required

a) Supporting Yukon University procurement transactions by:

- Advising clients with respect to appropriate public procurement methods
- Reviewing requisitions for accuracy, adherence to policy
- Supporting clients in development and implementation of tenders; including Value-Driven, Price-Driven, Invitational, Public etc., using established templates, policies and procedures
- Working with clients to address queries from proponents through tendering process.
- Collecting and distributing proposals, quotations and tender documents securely
- Attending tender award meetings and vendor debriefs to provide support, if needed
- Generating purchase orders and assisting with contract document preparation
- Ensuring that contractors comply with insurance and regulatory requirements.
- Tracking contracts and renewals, and advising internal clients of renewal opportunities
- Training and coaching internal clients on procurement processes
- Maintaining files and records accurately

Approximate percentage of job time above functions are performed: 65%.

2. Other Principal Activities, in order of importance (describing for each what, why, and how, and approximate percentage of job time required, rounded off to the nearest 5%):

- Assisting with and/or managing financial processes, transaction recording, and bank and visa reconciliations
- Reviewing transactions for cost reasonableness, allowability and accuracy
- Preparing reports in compliance with policies and procedures
- Supporting payroll preparation where needed.
- Liaising with stakeholders to complete reports, transactions and revisions effectively.
- Supporting the development of accurate financial statements, ledgers and forms.
- Assisting with audit preparation, auditor reviews and implementation of recommendations.
- Working with budget officers and other members of the Finance Team to ensure that they are providing cohesive, consistent, high-quality service to internal and stakeholders.
- Making recommendations to improve financial controls, policies, and workflow processes.

Approximate percentage of job time above functions are performed: 30%.

3. Other duties as directed, for example:

- acting as Manager in their absence
- assisting Manager with high value tenders and contracts
- representing the Procurement & Contracts department on committees

Approximate percentage of job time above functions are performed: 5%

4. Approximately how long will it take for a fully qualified employee from outside the work unit to reach the full working level of the position:

Six months, although would not see the full annual cycle until one year is complete.

B. Problem-solving and decision-making

1. a) List any sections of Acts, Regulations, and Policies or Procedures the incumbent must be fully familiar with in order to perform the position's functions:

- Yukon University Procurement and Contracting Policy/procedures
- Yukon University financial coding procedures (including cap/o+m definitions)
- Yukon University insurance policies related to contracting of services.
- Laws of contract (tendering)
- Distinction between contracts for services and contracts of services (employment) – Canada Revenue Agency requirement.
- ATIPP requirements with respect to tender and contract documents

b) Is the position responsible for interpreting, administering, or enforcing any of the above? If yes, explain.

- Yes, responsible for interpreting, administering and enforcing the Procurement and Contracting Policy/procedures.
- Responsible for interpreting and administering Yukon University financial coding

- procedures, Yukon University insurance policies, and Laws of contract (tendering).
- Ensuring confidentiality of tendering proposals

2. a) Describe the kinds of recommendations the incumbent is regularly required to make and to whom:

- Policy/procedural improvements to Manager
- Procedural approach to tendering, evaluation and award of contract to Manager
- Improvements to reports used in the Unit, to Manager

b) Who normally makes the final decisions with respect to those recommendations?

Manager – policy decisions approved at Senior Management level.

3. a) Describe the kinds of final decisions regularly made for which the incumbent is held accountable.

Procedural approach to tendering, evaluation and award (in consultation with Client) of procurement transactions within the predefined procurement thresholds as outlined in the Yukon University Procurement Guidelines.

b) What is the direct impact of those decisions?

- Potential impacts to the University's reputation as having an open and fair procurement process.
- Impacts the University's audit regarding policy compliance.

C. Freedom to Act

1. Describe the way in which this position receives direction:

- Requisitions from Client Departments
- Client Department requests
- Daily discussions with Manager on priorities and status of transactions
- Regular staff meeting in the Unit.
- Maintaining knowledge of trends/changes and evolving transaction management with respect to Public Sector tender and contract management and processing

2. What legislation, regulations, procedures, or established practices guide, constrain, or limit the activities of this position?

- Yukon University Procurement and Contracting Policy/procedures with respect to tendering with public sector
- Generally accepted Public Sector procurement processes and industry standards with regards to tendering and contracting
- Trade Agreements – e.g. Canadian-European Trade Agreement (CETA), the Canadian Free

Trade Agreement (CFTA), the New-West Partnership Trade Agreement (NWPTA), and more etc.

- Law of contract (tendering)
- WHMIS, CRA and WCB regulations
- Insurance regulations with respect to contracting of services.
- Accountability to stakeholders (publicly funded academic institution subject to scrutiny on how it conducts its procurement transactions)
- Collective Agreement

3. How is the work of the position normally checked or evaluated?

- Internal client feedback
- Supervisor feedback
- Vendor/contractor feedback

4. What types of decisions are normally referred to the supervisor? (Give examples)

See B.2 a)

D. Financial Accountability

1. a) Annual Budget (for unit under the direct control of the position):

| | |
|-------------------------------------|--------|
| Fiscal year: | \$ N/A |
| Annual payroll: | \$ |
| O/M Budget (excluding payroll): | \$ |
| Capital Budget (excluding payroll): | \$ |
| Revenues: | \$ |
| Recoveries: | \$ |

b) Who prepares this budget? N/A

c) What is this position's accountability for budget once allotted? N/A

d) Does position have authority/ability to reallocate resources? (describe)No

e) Signing authority levels:

Expenditures to \$3,000

Recommends credit card limits within overall University credit card limit.

2. Other expenditures or revenues influenced by this position and how.

Position influences how expenditures are made by ensuring conformance to Policy/procedures and compliance with applicable laws and regulations.

E. Management Supervision of Human Resources

| | |
|----------|--------------------------|
| x | 1. No supervisory duties |
| | 2. Supervisory Duties |

a) Number of positions supervised directly:

0 Permanent
0 Aux/Casual

b) Nature of supervision: **(check any of the following supervisory tasks that are to be performed on a regular basis):**

| | | |
|--|----|--|
| | a) | Show colleagues how to do tasks. |
| | b) | Train other employees in work procedures. |
| | c) | Assign work and review for quality/quantity. |
| | d) | Establish work priorities and schedules. |
| | e) | Change duties and responsibilities. |
| | f) | Participate with supervisor in employees' performance evaluation; -or- Formally appraise employees' performance and discuss appraisal with them, making a final recommendation to advance or withhold merit increments. |
| | g) | Recommend appointment or rejection upon completion of probationary period. |
| | h) | Interview employees with attendance or performance problems. |
| | i) | Act as first formal step in the grievance procedure. |
| | j) | Interview candidates for vacant positions in the unit. |
| | k) | Give opinion to supervisor on selection of new employees; - or - Make final decision on selection of employees. |
| | l) | Other. |

F. Key Personal Contacts

Who (what positions or groups) Purpose Frequency

| | | |
|---------------------|--|---------------|
| University Clients | liaison on requisitions for goods/service | daily |
| IT department | system and reporting issues | as required |
| Vendors/contractors | liaison in contracting goods/services | daily |
| Insurance broker | Get advice on procurement transactions | semi-annually |
| Credit card company | liaison on procedures/billings | monthly |
| Supervisor | advise/support | Daily |
| Manager of Finance | Information, updates, occasional direction | As required |

G. Tools, Equipment, or Machinery Used

Name Purpose Percentage of time

| | | |
|--------------------------|--|-----|
| Computer/printer/scanner | | 75% |
| | | |

H. Working Conditions

Describe any adverse conditions that are normal and expected in the job.

a) Describe weights lifted:

| <u>Type</u> | <u>How Heavy</u> | <u>Percentage of time</u> |
|-------------|------------------|---------------------------|
| File boxes | 25 lbs | 5% |

b) What working conditions (sitting, standing, bending, reaching) or types of physical effort (hiking, walking, driving) are required?

| <u>Type</u> | <u>Percentage of time</u> |
|--|---------------------------|
| At workstation or meeting table (sitting and standing) | 90% |
| Walking/standing (retrieving printing, or filing) | 10% |

c) Describe any physical hazards present:

| <u>Type</u> | <u>Percentage of time</u> |
|------------------|---------------------------|
| Work on computer | 75% |

d) Describe special physical conditions leading to discomfort:

| <u>Type</u> | <u>Percentage of time</u> |
|-------------|---------------------------|
| | % |

e) Interpersonal Conditions: Check any of the following conditions, which are normal and expected in the job and give examples:

| | |
|-------------------------------------|---|
| | high level of dissatisfied clients |
| | high level of emotional clients |
| | potential for physical abuse from clients |
| <input checked="" type="checkbox"/> | regular critical deadlines |
| <input checked="" type="checkbox"/> | high level of irregular critical deadlines |
| <input checked="" type="checkbox"/> | constant interruptions |
| <input checked="" type="checkbox"/> | instructions from more than one source |
| <input checked="" type="checkbox"/> | students or staff under work related stress |
| <input checked="" type="checkbox"/> | Other: mental stress due to nature of problem solving and multi-tasking |

Examples in support:

Incumbent must deal with prioritizing multiple requests for service, many with tight timelines (several without regard for policy/procedures), as well as ensuring regularly scheduled tasks are completed.

(f) Travel Required

| | | |
|----|--------------------------------------|------------------|
| a) | average number of trips annually | 1 |
| b) | average number of days per trip | 3 |
| c) | average distance per trip | Within Canada |
| d) | most frequent mode of transportation | air |

I. Organization Chart

IMMEDIATE SUPERVISOR'S POSITION

Title: Manager Procurement & Contracts

Classification Level: TBA

PEER POSITIONS: (all those reporting to the same immediate supervisor)

Title: Procurement Officer

Classification Level: BU07

Title:

Classification Level:

SUBJECT POSITION TITLE: Procurement Officer

SUBORDINATE POSITIONS:

N/A

PART III - SIGNATURES

I confirm that this describes the duties and responsibilities I require of an incumbent in this position and have reviewed the description with the incumbent (where applicable).

.....
Dean/Director or Designate

Date:

I have read the foregoing position description and understand that it is a general description of the duties and responsibilities assigned to the position I occupy.

.....
Incumbent

Date:

PART IV - QUALIFICATIONS

To be completed by the Dean/Director or designate

A. Minimum Knowledge, Skills, and Abilities Required

- Extensive knowledge of office/business practices
- Strong knowledge of the stages of procurement cycle, from solicitation to contract development to payment
- Good knowledge of relevant finance and procurement regulations and norms
- Good understanding of basic desktop applications (MS Word, Excel, and SharePoint)
- Ability to prioritize multiple requests
- Good time management skills
- Excellent communication skills, written and oral (internal clients and external vendors)
- Good interpersonal skills (tact, diplomacy, etc)
- Good comprehension skills (interpret requirements)
- Good analytical skills (e.g. recommending procurement approaches, generating reports)
- Demonstrated experience in administering financial transactions (e.g. accounts payable, payroll, accounts receivable, reconciliations, etc.)

B. Licenses, Certificates Required - Give title and section of any legislation, regulations, or other authority where applicable.

- 2-year or higher diploma or degree in a related field is an asset

C. Other skills and/or knowledge which may be desirable, but not necessarily essential to the performance of the position's duties.

- Micro-credentials or training in Supply Chain Management, Procurement, Public Sector Purchasing, Project Management Professional (PMP) or Financial Administration from a recognized institution or association will be considered an asset.
- Experience in project delivery, project scoping and planning will be considered an asset
- Experience in contract development, contract management or contract administration will be considered an asset.
- Experience in insurance or risk mitigation and management will be considered an asset.
- Experience in asset management will be considered an asset.
- Experience with Corporate Administrative System (e.g. Banner, FAST, other)
- Public Sector Procurement Procedures and Regulations

PART V – UNIVERSITY SIGNOFF

Comments:

I approve this position description as being representative of the work I require to be performed and that the responsibility levels identified have been delegated to this position.

.....
Director, Human Resources Services

.....
University President

Date:

Date:

FOR HUMAN RESOURCE SERVICES USE ONLY:

| | |
|---------------------------|-------|
| Evaluation Point Results: | |
| Knowledge and Skills: | ... |
| Accountability: | ... |
| Mental Demands: | ... |
| Working Conditions: | |
| | |
| Total Points: | ... |
| Pay Level: | ... |