

POSITION DUTY STATEMENT

DFPI-HR0 203 (Rev. 08-21)



NAME Vacant	EFFECTIVE DATE
CLASSIFICATION TITLE Analyst II	POSITION NUMBER 410-114-5393-001
WORKING TITLE Contract Analyst	DIVISION/OFFICE/UNIT/SECTION Administrative Division/Business Operations Office/Acquisitions Services Unit
BARGAINING UNIT R01	GEOGRAPHIC LOCATION Sacramento

General Statement:

Under direction of Supervisor I of the Acquisition Services Unit (ASU), the Analyst II (Contract Analyst) independently performs the more responsible and complex, sensitive, and high-risk procurement and contracting activities for the Department. The incumbent serves as a subject matter expert in State procurement and contracting laws, regulations, policies, and procedures; provides consultation to executive management and program staff; leads procurement projects; develops and implements procurement policies and procedures; mentors staff, and performs complex analytical work related to purchasing, contracting, contract administration, and strategic sourcing. Duties include, but are not limited to the following:

A. Specific Assignments [Essential (E) / Marginal (M) Functions]:**40% (E) Contracts Administration**

Responsible for the preparation and administration of personal services contracts, interagency agreements, specialized service contracts, and amendments. Utilizes the Authorium (City Innovate) Document Builder to create, review, process, and conduct solicitation process and establish contract documents, including Request for Proposals (RFPs), Request for Offers (RFOs) or SB/DVBE Options which includes reviewing Scope of Work, confirming budget approval, determining feasible and appropriate bid methods, compiling solicitation packages. Responsible for obtaining and verifying competitive bids, proceeding and coordinating bids evaluation; establishing Procurement Contracts and Purchase orders in the FI\$Cal system, tracking contracts to ensure approval in a timely manner, maintaining the internal contract records system in Authorium (City Innovate) System and SharePoint. Identifies specifications or deliverables, determines legal requirements, interprets varying sources of difficult laws and requirements for specialized services contracts such as California Government Code, Public Contract Code, State Administrative Manual (SAM) and State Contracting Manual, Volumes 1 and 2 (SCM, Vols. 1& 2) and control agency directives.

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Develops and/or reviews a wide variety of consulting and services contract requests; develops and obtains sole source and advertising exemptions; secures control agencies' exemption approval (Department of Justice, Office of the Attorney General; Department of General Services, Office of Legal Services; etc.); develops contract language; obtains authorized signatures; reviews and distributes contracts as appropriate (contractor, State Controller's Office, accounting office, internal users of the services contracted, and other control agencies as required); and processes contract amendments.

30% (E)

Procurement, Research and Analysis

Prepares Purchase Order documents for IT and/or Non-IT goods and services. Creates Purchase Orders in FI\$Cal system. Independently research, develops, and prepares Purchase Orders and Service Orders. Independently analyzes and interprets the related laws, regulations, policies and procedures appearing in different resources including Public Contract Code, State Contracting Manual and DFPI Business Operations Office procedures. Collaborate with Procurement requestor to ensure completeness and Compliance with the state contracting laws, regulation, policies and procedures. Develops and amends departmental processes and procedures, monitors adherence to all departmental and control agency purchasing policies and procedures, researches product availability, which requires meeting with vendors and verifying vendor and product performance; preparing and issuing departmental procurement requests utilizing the Department's Authorium (City Innovate) Procurement System; secures exemption from control agencies such as California Correctional Training and Rehabilitation Authority (CALCTRA) , Office of State Publishing (OSP), etc.; maintains procurement related files and records; prepares procurement reports; and attends Department of General Services events related to purchasing.

25% (E)

Research, Analysis, Support and Training

Serves as the main point of contact for all contracts/ procurement requests assigned to the incumbent. Coordinate with Accounting and Budgets with any contract or procurement related monetary issues. Provides training and contract consultation services, both legal and technical, to departmental staff at all levels; and assists contract users in preparing the required contract evaluation reports. Performs the more technical/analytical special projects relating to the department's business services operations. This includes identifying the scope of the project; developing project plans, timelines, and procurement worksheets/templates using Microsoft 365 applications (e.g. Excel, Word, SharePoint); determining available resources; analyzing data; developing alternatives and making formal recommendations for management's consideration.

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5% (M) Performs other related duties as required.

B. Supervision Received

The Analyst II reports directly to and receives the majority of assignments from the ASU Supervisor I. However, direction and assignments may also come from the Business Operations Office (BOO) Supervisor II and BOO Chief.

C. Supervision Exercised

None.

D. Administrative Responsibility

None.

E. Personal Contacts

The Analyst II has contact with 1) Employees of DFPI 2) General public, vendors, contractors 3) Control Agency (e.g., DGS, CalHR, FISCAL) employees; 4) DFPI Executive staff; 5) Agency.

F. Actions and Consequences

The actions of the incumbent have a direct bearing on the success, integrity, and compliance of the Department's Acquisitions Services Unit. Failure to perform the duties and responsibilities of this position could result in process inefficiencies impacting ASU's ability to execute contracts and purchase orders in a timely manner. The impact would be significant.

G. Functional Requirements

The incumbent works 40 hours per week in an office setting, with artificial light and temperature control. The use of a personal computer, telephone, copier, scanner, and fax machine is essential to the duties of this position. The position requires bending and stooping to retrieve files, sitting, and standing consistent with office work, and light lifting of no more than 25 lbs.

H. Other Information

Exercises good judgment in decision-making, exercises creativity and flexibility in problem identification and resolution, and manages time and resources effectively. Works well with others, under changing priorities, and work irregular hours when workload dictates. Regular attendance and punctuality are essential. Possesses good written and verbal communication skills. This position requires the ability to communicate effectively and diplomatically, learn rapidly, follow directions, analyze data accurately, reason logically, and maintain the confidence and cooperation of those contacted during the course of work.

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CONFLICT OF INTEREST

This position is subject to Title 10, § 250.30 of the California Code of Regulations, the Department of Financial Protection and Innovation’s Conflict of Interest Regulations, the incumbent is required to submit a Statements of Economic Interests (Form 700) within 30 days of assuming office, annually by April 1st and within 30 days of leaving office.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary or are unsure, discuss your concerns with the hiring manager. The hiring manager will discuss your concerns with the Health & Safety analyst.)

Employee Signature

Date

Employee’s Printed Name, Classification

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Supervisor’s Printed Name, Classification