

## POSITION DESCRIPTION

### Purchasing Clerical

#### SECTION I: GENERAL INFORMATION

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|
| <b>Position Title:</b><br>Purchasing Clerical                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Department:</b><br>Business Services  |
| <b>Immediate Supervisor's Position Title:</b><br>Executive Director of Business Services and Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <b>FLSA Status</b><br>Non-Exempt         |
| <b>Pay Grade Assignment:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <b>Bargaining Unit:</b><br>Clerical Unit |
| <b>General Summary of Purpose Of Job:</b><br><p>Under general supervision, the Purchasing Clerical provides specialized administrative and operational support for the district's purchasing activities. This role is primarily responsible for the complete purchasing lifecycle related to Career and Technical Education (CTE) programs and various grant-funded initiatives. This position requires a high degree of attention to detail, analytical ability, and independent problem-solving to ensure the accuracy and timely processing of complex purchasing transactions. The Purchasing Clerical serves as a key liaison with internal departments and external vendors, and also supports general purchasing for the school district as needed, ensuring all procurements comply with federal, state, and district regulatory requirements.</p> |                                          |

#### SECTION II: ESSENTIAL DUTIES AND RESPONSIBILITIES:

| <b>Duty No.</b> | <b>Essential Duties: (These duties are a representative sample; position assignments may vary.)</b>                                                                                                                                                                           |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.              | Administers and executes purchasing procedures for CTE and grant-funded programs, overseeing site purchasing, reviewing quotes for tax exemption, ensuring complete product descriptions, and assigning appropriate budget and grant codes for tracking.                      |
| 2.              | Provides high-level financial oversight and reporting for CTE and grant programs, analyzing purchasing data to help inform budget planning and resource allocation.                                                                                                           |
| 3.              | Acts as a primary point of contact for CTE audits and grant administrators, ensuring all financial documentation and purchasing records are accurate and readily available.                                                                                                   |
| 4.              | Manages the full purchase order (P.O.) lifecycle for CTE and grant purchases, including creating and sending P.O.s to vendors, facilitating shipments to sites, and managing annual blanket P.O.s, ensuring strict alignment with district policies and grant-specific rules. |
| 5.              | Reconciles complex vendor invoices and statements, splitting amounts across departments or multiple grant/budget codes, and resolving discrepancies and billing issues.                                                                                                       |
| 6.              | Provides dedicated support for staff purchasing needs, assisting with order placement, navigating the purchasing system, and ensuring adherence to procedures for grant-funded items.                                                                                         |
| 7.              | Ensures rigorous financial compliance and reporting for purchasing, including verifying vendor data, applying in-depth knowledge of UFARS to daily tasks, and generating purchasing reports for auditors and grant managers.                                                  |
| 8.              | Maintains accurate purchasing and financial records, performing regular reconciliations and managing digital and physical vendor and purchase order files.                                                                                                                    |
| 9.              | Collaborates and communicates effectively with CTE staff, grant managers, principals, coordinators, and other department personnel to answer questions, resolve problems, and explain purchasing policies and procedures.                                                     |

|     |                                                                                                                                                                                                                                  |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10. | Manages vendor relationships, receiving and responding to inquiries, concerns, complaints, and requests for assistance in a professional and courteous manner. Enter vendor information into finance system, such as 1099 or W9. |
| 11. | Assists with training and professional development, hosting informational sessions and training new office/clerical staff on purchasing procedures, especially those related to CTE and grants.                                  |
| 12. | Attends staff meetings, trainings, seminars, and workshops to enhance job knowledge and skills.                                                                                                                                  |
| 13. | Performs general office and administrative tasks, including establishing and maintaining files, copying, filing, faxing, emails, answering telephones, and assisting with special projects as required.                          |

### SECTION III: WORK REQUIREMENTS AND CHARACTERISTICS

#### EDUCATION/EXPERIENCE REQUIREMENTS: Minimum education and experience required to perform adequately in position could reasonably be attained only by completing the following:

|   |                                                                                                                                                                                                                                                                                                                                                                    |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| X | <b>High school diploma or GED.</b>                                                                                                                                                                                                                                                                                                                                 |
|   | <b>Degree Required:</b>                                                                                                                                                                                                                                                                                                                                            |
| X | <b>Required Work Experience in Addition to Formal Education/Training:</b><br>Minimum five (5) years of progressively responsible experience in purchasing, accounts payable, or related administrative support, demonstrating a strong understanding of procurement and financial operations, OR a combination of education and experience totaling six (6) years. |
|   | <b>Required Supervisory Experience:</b>                                                                                                                                                                                                                                                                                                                            |

#### PREFERRED EDUCATION/EXPERIENCE REQUIREMENTS:

- Associate's or Bachelor's degree in Business, Accounting, Finance, or a related field is preferred.
- Experience in school finance, specifically with grant or CTE purchasing.

#### LICENSE/CERTIFICATION: (Identify licenses/certification required upon hiring:

None required.

#### ESSENTIAL KNOWLEDGE, SKILLS AND ABILITIES REQUIRED TO PERFORM THE WORK

##### Knowledge

- Knowledge of purchasing policies, accounting standards, and internal controls.
- Understanding of financial regulations and compliance, with an ability to learn specific requirements (e.g., UFARS).
- Advanced customer service principles in financial and vendor interactions.
- Proficiency in enterprise financial software and Microsoft Excel for data analysis and reconciliation.
- Proficiency in digital and physical purchasing record-keeping and audit readiness.

##### Skills

- Strong organizational and time management skills for high-volume, deadline-driven workloads.
- Strong verbal and written communication skills to articulate financial and purchasing information clearly.
- Absolute discretion and strict confidentiality with sensitive financial data.
- Proficient operation of office equipment essential for financial processing.
- Skill in designing and maintaining robust financial filing and record management systems.
- Adept at interpreting and applying purchasing policies and regulations.
- Strong judgment and analytical skills to resolve financial discrepancies.
- Data analysis and reconciliation skills using spreadsheets for financial validation and reporting.

- Proactive problem-solving skills to anticipate and resolve operational challenges.

#### Abilities

- Foster collaborative relationships with staff, vendors, and external partners.
- Work independently with minimal supervision, demonstrating initiative and efficiency under pressure.
- Independently identify, analyze, and resolve financial and administrative problems.
- Uphold the highest level of confidentiality and ethical standards.
- Accurately classify, record, retrieve, and verify large volumes of purchasing data.
- Utilize financial software features to optimize workflows and generate reports.
- Apply strong mathematical aptitude for financial calculations and data validation.
- Adapt and remain flexible amidst evolving regulations, software, and priorities.

#### PHYSICAL REQUIREMENTS: Indicate according to the requirements of the essential duties/responsibilities

| Employee is required to:                            | Never      | 1-33%<br>Occasionally | 34-66%<br>Frequently | 66-100% Continuously |
|-----------------------------------------------------|------------|-----------------------|----------------------|----------------------|
| Stand                                               |            | √                     | √                    |                      |
| Walk                                                |            |                       | √                    |                      |
| Sit                                                 |            |                       | √                    |                      |
| Use hands dexterously (use fingers to handle, feel) |            |                       |                      | √                    |
| Reach with hands and arms                           |            |                       | √                    |                      |
| Climb or balance                                    | √          |                       |                      |                      |
| Stoop/kneel/crouch or crawl                         |            | √                     |                      |                      |
| Talk and hear                                       |            |                       |                      | √                    |
| Taste and smell                                     | √          |                       |                      |                      |
| <b>Lift &amp; Carry:</b> Up to 10 lbs.              |            |                       | √                    |                      |
| Up to 25 lbs.                                       |            | √                     |                      |                      |
| Up to 50 lbs.                                       | √          |                       |                      |                      |
| Up to 100 lbs.                                      | √          |                       |                      |                      |
| More than 100 lbs.                                  | √          |                       |                      |                      |
| <b>Vision Requirements:</b>                         | <b>Yes</b> | <b>No</b>             |                      |                      |
| No special vision requirements                      | √          |                       |                      |                      |
| Close Vision (20 in. of less)                       |            | √                     |                      |                      |
| Distance Vision (20 ft. of more)                    |            | √                     |                      |                      |
| Color Vision                                        |            | √                     |                      |                      |
| Depth Perception                                    |            | √                     |                      |                      |
| Peripheral Vision                                   |            | √                     |                      |                      |

#### General Environmental Conditions:

Work is performed under normal office conditions and there are minimal environmental risks or disagreeable conditions associated with the work. The typical noise level is considered to be moderate.

#### General Physical Conditions:

**Work can be generally characterized as:**

**Sedentary Work:** Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body.

#### RESPONSIBILITY FOR DIRECT SUPERVISION OF THE FOLLOWING POSITIONS:

N/A

#### SECTION IV: CLASSIFICATION HISTORY AND APPROVAL

This Position Description reflects an accurate and complete description of the duties and responsibilities assigned to the position.

\_\_\_\_\_  
**Signature – Human Resources**

\_\_\_\_\_  
**Date**

**Job Classification History:**

Prepared by TS 9/2025

Board Approval:

Reviewed/updated:

Reviewed/updated: