

## Business Service Officer II (Specialist)

### *Essential Task Rating Results*

1.	Authorize all purchases for department's operating needs through Master Service Agreements, Cal Cards, and through the 277 purchase order process by reviewing for pricing feasibility, office needs etc. before providing signature and submission.
2.	Place, prepare and process purchase requests for office and communications equipment (e.g. signs, rubber stamps, business cards, investigator ID cards, calling cards, furnishings) to supply the needs of the department.
3.	Initiate and coordinate the procurement process for facility related procurements, including contacting vendors, researching product information, and repairing related procurements, office and conference room furniture and audio/visual equipment.
4.	Monitor the purchases and contract functions that provide for the procurement of equipment and commodities for the department in accordance with Purchasing Authority Manual (PAM) or other department manuals.
5.	Provide all appropriate documentation to customers, procurement supervisors, and/or business service staff to facilitate the procurement process, justify purchases, and supply needs.
6.	Complete, copy, and submit purchase orders to appropriate personnel for procurement process approval, and to the purchasing authority for payment, and file purchase order documentation for office records.
7.	Prepare purchase estimates for items that are above Contract Delegation Authority amount and gain approval from the purchasing authority and/or appropriate funding sources.
8.	Develop and document processes and procedures for the request and procurement of new or replacement facility related equipment to provide business service office staff with operations guidance.

9.	Review service and non-service orders for completeness, feasibility and compliance.
10.	Review prepared requisition requests, checking for content (e.g. funding code, justification, items being requested), respect to costs, completeness (including taking steps to acquire necessary information for incomplete forms), in compliance with the State Administrative Manual (SAM) or other purchasing policies before forwarding to management for budgeting approval.
11.	Review logs, shipping and delivery receipts, and accounting documents for non-receipt of order to track and maintain inventory.
12.	Review and approve invoices for maintenance and rental contracts in accordance with the State Administrative Manual (SAM) or other purchasing policies.
13.	Evaluate requests (e.g. new equipment, service) against the standard and existing inventories and identify alternatives to purchasing new materials
14.	Review client and vendor status and performance for compliance with regulations, policies and procedures and distribute instructions, guidelines, and requirements.
15.	Verify that the purchase document reflects the recycled-content mandated by CalRecycle according to established policies and procedures.
16.	Develop service agreements and contracts in coordination with vendors to provide warranties for equipment repairs and services.
17.	Write specifications for supplies, rental equipment, maintenance contracts, and alteration of facilities (including office moves) to meet supply needs, efficiently use available space/resources, and maintain compliance with the Department of General Services policies or other applicable authorities.
18.	Consult with maintenance contractors in writing, in person, or over phone by analyzing equipment specifications and comparing to the needs of the department to write appropriate service agreement recommendations.

19.	Develop justifications for contracts to justify needs of expenditures, to comply with department's mission critical statement in accordance with procurement procedures.
20.	Monitor and track the fulfillment of numerous facility contracts and service calls (e.g. janitorial, plumbing, landscaping, pest control, vending machines, elevator, climate control, furniture, audio/visual equipment) to evaluate contracted vendor performance against service contracts and document vendor performance.
21.	Review contracts for compliance with State policies and regulations, to ensure that the scope of work is completed, and that required documents are included.
22.	Supervise bidding process including preparation of the Invitation for Bid or Request for Proposal, creating a bidders list, developing the scope of work to be performed, preparing or obtaining all attachments and determine the method of award.
23.	Prepare the Invitation for Bid or Request for Proposals by obtaining and including all needed bidding attachments to award contracts in accordance with governing laws.
24.	Develop the scope of work to be performed to specify contract service requirements prior to the bidding process.
25.	Utilize methods of awarding bids (e.g. scoring submitted contracts) to award bids following appropriate rules and regulations.
26.	Secure price quotes from vendors to determine vendor costs and award the purchase to the most qualified vendor in terms of price, service, timeframe, product availability and business qualifications.
27.	Solicit bids by gathering relevant specifications, and placing recommendations and proposals for procurements.
28.	Coordinate cubicle reconfiguration by initiating appropriate paperwork, tracking workers and contractors, and maintaining price schedule compliance to optimize space resources.
29.	Identify issues and negotiate resolutions with leaser when appropriate, including lease contract interpretation.

30.	Maintain and interpret facility floor plans to plan and make recommendations to management on facility issues (e.g. office moves, alterations of facilities).
31.	Oversee the safe operation and maintenance of warehouse and stockroom equipment (e.g. pallet jacks, forklifts, ladder) to maintain a safe and productive work environment.
32.	Determine efficient storage methods for maintaining organization and inventory of equipment.
33.	Administer the issuing of identification badges to employees to enable building and departmental access.
34.	Prepare and submit Cruise documentation to the Department of General Services (DGS) to request floor space (e.g. lease, state owned), changes to space, alterations (e.g. walls, modular furniture), and relocations.
35.	Ensure that proper procedures are being followed in receiving and decaling capitalized assets and sensitive equipment, which includes tracking the acquisition value of all components for each purchase, description, serial numbers, model numbers, location, and reporting unit to which it is assigned.
36.	Log, monitor and track equipment inventory using detailed records to identify available departmental resources for maintaining office operations (e.g. furniture moves, cubicle reconfiguration, shipping services).
37.	Research, reconcile, and rectify inventory discrepancies by conducting a physical inventory, referring to supporting documents (e.g. weekly physical inventory cycle count, database), initiating an inventory adjustment, and administering another cycle count.
38.	Coordinate the deployment of department equipment, working in conjunction with a variety of internal service units.
39.	Verify and document the receipt of equipment prior to submission of payment to ensure proper requisition of goods and services.

40.	Establish and coordinate receipt, installation, and repair of owned and leased equipment for department facilities by contacting vendors for contracted services
41.	Secure services and repairs for department equipment by gathering information regarding service requests, completing maintenance request service forms, and contacting vendors and submitting invoices for approval.
42.	Coordinate building repair by contacting vendors, contractors, and lessors to maintain facilities.
43.	Identify repairs as routine maintenance, minor capital outlay, or special repair and resolve per current department procedures and governing rules, mandates, and laws.
44.	Develop processes and procedures to identify and resolve routine maintenance issues (e.g. Service Desk incidents, work orders; email, telephone and in-person requests/complaints).
45.	Capture and analyze data regarding building repair and maintenance issues to identify costs and to make recommendations to management.
46.	Review vehicle accident reports, checking for completeness before submitting to appropriate personnel.
47.	Supervise the collection and processing of incoming (e.g. interagency, interdepartmental) and outgoing (e.g. post office, messenger, overnight) mail by receiving, logging, sorting, loading, and delivering goods and equipment per departmental procedures.
48.	Supervise the appropriate use of departmental mail machines including controlling unauthorized use, requesting postage, maintenance, supplies, and maintaining all logs and/or reports.
49.	Ensure and verify postage meters are up-to-date regarding postage to rate increases.
50.	Administer the Cal Card accounts by acting as the point of contact between corporate accounts and State employees, assisting with applications, communicating information to involved parties, and resolving issues.

51.	Set up Cal Card accounts with new applicants by gathering applicant information, submitting appropriate forms to the bank, and receiving issued cards to maintain current records.
52.	Review, audit, and submit statements, reports, Cal Card approval documents and forms for maintenance of the unit's Cal Card program to comply with applicable documentation requirements.
53.	Communicate guidelines and implement corrective actions when necessary to enforce the divisional and departmental mandates on credit card use.
54.	Create, prepare and update standards, policies and procedures pertaining to the use of equipment, facilities, or services.
55.	Prepare and update operations manuals by researching, interpreting and analyzing the State Administrative Manual (SAM) and applicable rules and regulations to maintain departmental compliance and uniformity.
56.	Plan/Prepare, submit, and distribute reports (e.g. security, maintenance, accounting, annual, energy conservation) to keep accurate records (e.g. number of transactions in a specified amount of time) and document processes and activities using spreadsheet software.
57.	Track and monitor the completion of mandatory reports by reviewing reports for content, quality, and format to ensure completion within necessary timelines.
58.	File documentation (e.g. contracts, service orders, tickets, travel expense claims) to maintain proper records of all business service operations.
59.	Develop spreadsheets summarizing information (e.g. requisitions, payments) used for reference purposes in audits and reports.
60.	Develop and maintain filing systems (e.g. electronic, manual) using various filing methods (e.g. numerical, categorical, alphabetical).
61.	Interpret new legislation and policies to ensure compliance within all business service functions.

62.	Collect data for departmental functions (e.g. purchase estimates from vendors, printing requests, material requests) for cost analysis and decision making purposes by viewing online or paper catalogs.
63.	Research and provide input on new industry standards available to submit recommendations to management.
64.	Research products (e.g. office supplies/equipment, costs) and services to determine if they meet departmental needs, make recommendations to management, and obtain documentation which substantiates proposed purchases.
65.	Analyze and evaluate the effectiveness of programs, policies or procedures related to the progress of work projects or assignments to identify problems or issues, determine impact, assess alternatives for resolution and/or formulate action plans.
66.	Develop immediate and long-range work objectives for activities and operations to structure departmental undertakings.
67.	Develop and maintain project schedules by updating and revising activity and milestone schedules, resource requirements, and other task-related information to ensure accurate, updated project information and statistics.
68.	Plan and implement changes to improve the quality of business service functions using performance data, technological enhancements, and customer and managerial feedback.
69.	Prepare statistical data and spreadsheets to track, and monitor budgets.
70.	Develop and oversee the reporting of various budgets for projects, programs, or work units, to ensure appropriate coding and entry of expenditures, monitor operating expenses, and to ensure compliance with applicable budgetary guidelines.
71.	Review, approve, dispute, and apply funding codes to invoices for services on behalf of the field office managers and forward to Accounting Office for payment.
72.	Prepare projected expense reports to include equipment dates, costs of proposed new equipment, and value of current equipment.

73.	Provide forecasting, reconciliation and analysis of fiscal year expenditures to determine projected expenditures.
74.	Audit maintenance, purchase and contract invoices, to balance expenditures to ensure billing and compliance with budgetary restraints.
75.	Act as department liaison by coordinating with all involved entities on projects to communicate pertinent information and alleviate potential issues.
76.	Coordinate with staff and appropriate parties all special projects, including any pricing studies for future purchases.
77.	Make recommendations to management regarding programs and projects to more effectively utilize resources and to provide more efficient services.
78.	Respond to requisition requests by soliciting vendors for quotes, comparing vendors on numerous dimensions including price, availability and product quality to determine appropriate selection.
79.	Notify stakeholders of changes related to programs, processes/procedures, governing rules, and other pertinent information to keep them up-to-date on new requirements and compliance issues.
80.	Conduct meetings to convey and present pertinent information to stakeholders.
81.	Participate in task force meetings and/or cross functional teams to provide expertise on business service topics.
82.	Direct and coordinate task force meetings involving multiple business services experts to delegate assignments, plan and implement projects, and establish business needs.
83.	Investigate and resolve questions and complaints related to projects and programs from stakeholders in responding to various customer service needs by providing information and explaining policies and procedures.

84.	Draft correspondence (e.g. letters, memos, emails) addressing various issues or policies, as well as relating to disputes and complaints, to provide guidance to customers and stakeholders.
85.	Evaluate service desk request/complaint and determine the correct action to be taken using current procedures.
86.	Evaluate customer service practices of office staff by observing client/employee interactions and providing feedback on appropriateness of responses and/or actions.
87.	Delegate and assign work to staff based on functional areas involved, workload levels and individual expertise and skill required to accomplish objectives.
88.	Determine work priorities, scope of assignments and establishes deadlines for work to insure objectives are met effectively and in a timely manner.
89.	Prioritize the handling of problems or issues related to the progress of work projects or assignments to determine the best course(s) of action to mitigate the impact of such issues and/or problems.
90.	Coordinate interviews and controls hiring processes to comply with department's requirements and equal employment opportunity policies.