

## Business Service Officer I (Supervisor)

### *Essential Task Rating Results*

1.	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.
2.	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.
3.	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.
4.	Provide all appropriate documentation to customers, procurement supervisors, and/or business service staff to facilitate the procurement process, justify purchases, and supply needs.
5.	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.
6.	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.
7.	Review service and non-service orders for completeness, feasibility and compliance.
8.	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.

9.	Review logs, shipping and delivery receipts, and accounting documents for non-receipt of order to track and maintain inventory.
10.	Review and approve invoices for maintenance and rental contracts in accordance with the State Administrative Manual (SAM) or other purchasing policies.
11.	Evaluate requests (e.g. new equipment, service) against the standard and existing inventories and identify alternatives to purchasing new materials
12.	Review client and vendor status and performance for compliance with regulations, policies and procedures and distribute instructions, guidelines, and requirements.
13.	Verify that the purchase document reflects the recycled-content mandated by CalRecycle according to established policies and procedures.
14.	Develop service agreements and contracts in coordination with vendors to provide warranties for equipment repairs and services.
15.	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.
16.	Develop justifications for contracts to justify needs of expenditures, to comply with department's mission critical statement in accordance with procurement procedures.
17.	Review contracts for compliance with State policies and regulations, to ensure that the scope of work is completed, and that required documents are included.
18.	Develop the scope of work to be performed to specify contract service requirements prior to the bidding process.
19.	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.

20.	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.
21.	Determine efficient storage methods for maintaining organization and inventory of equipment.
22.	Monitor and regulate property disposal to maintain detailed records of equipment by inspecting equipment and justifying disposal before submitting notice to the state for approval.
23.	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.
24.	Prepare documents for decaling, transferring, or surveying capitalized and sensitive equipment.
25.	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).
26.	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.
27.	Coordinate the timely reordering and restocking of required materials to ensure sufficient supplies are readily available.
28.	Verify and document the receipt of equipment prior to submission of payment to ensure proper requisition of goods and services.
29.	Establish and coordinate receipt, installation, and repair of owned and leased equipment for department facilities by contacting vendors for contracted services

30.	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.
31.	Process imaging requests by opening, date stamping, sorting, and indexing incoming documents (e.g. forms, mail)
32.	Review all imaging documents for compliance with departmental imaging policies and quality assurance standards before inclusion into the imaging database.
33.	Create, prepare and update standards, policies and procedures pertaining to the use of equipment, facilities, or services.
34.	Track and monitor the completion of mandatory reports by reviewing reports for content, quality, and format to ensure completion within necessary timelines.
35.	File documentation (e.g. contracts, service orders, tickets, travel expense claims) to maintain proper records of all business service operations.
36.	Develop spreadsheets summarizing information (e.g. requisitions, payments) used for reference purposes in audits and reports.
37.	Develop and maintain filing systems (e.g. electronic, manual) using various filing methods (e.g. numerical, categorical, alphabetical).
38.	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.
39.	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.

40.	Plan and implement changes to improve the quality of business service functions using performance data, technological enhancements, and customer and managerial feedback.
41.	Make recommendations to management regarding programs and projects to more effectively utilize resources and to provide more efficient services.
42.	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.
43.	Evaluate customer service practices of office staff by observing client/employee interactions and providing feedback on appropriateness of responses and/or actions.
44.	Delegate and assign work to staff based on functional areas involved, workload levels and individual expertise and skill required to accomplish objectives.
45.	Determine work priorities, scope of assignments and establishes deadlines for work to insure objectives are met effectively and in a timely manner.
46.	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.
47.	Oversee hiring practices to ensure adherence to Equal Employment Opportunity (EEO) regulations.
48.	Serve on interview selection panels for vacant positions to decide or make recommendations to appointing authority on selection of individuals.
49.	Hire new employees into the work unit to fill vacant positions and ensure that the department has adequate personnel to complete tasks.

50.	Coordinate interviews and controls hiring processes to comply with department's requirements and equal employment opportunity policies.
51.	Oversee all business service operations within the office by reviewing the work of subordinate staff, and delegating assignments, ensure efficiency and compliance with departmental standards.
52.	Monitor the work of subordinate employees to ensure that it meets quality, quantity and timeliness standards.
53.	Administer provisions of collective bargaining agreements to ensure compliance in the course of supervising represented employees.
54.	Resolve disagreements and conflict between staff members to achieve a harmonious, productive work environment.
55.	Prepare employee performance evaluations and any other administrative reports to evaluate the work performance of staff by completing performance rating scales and providing feedback on an individual basis.
56.	Develop performance standards and appraises personal characteristics and work habits to determine areas of improvement.
57.	Identify and resolve employee performance problems by planning and implementing measures to improve employee performance.
58.	Develop duty statements to outline expectations, procedures, and responsibilities for staff using class specifications, and management input.
59.	Provide informal training to business service staff by demonstrating work or delineating tasks for successful performance to update and maintain a competent workforce.
60.	Conduct training needs analysis to determine the level and type of training needed by subordinates.
61.	Provide coaching to subordinate staff relating to the tasks of the job to improve performance and productivity.

62.	Operate equipment in place of regular staff to assist and ensure smooth production of services.
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