

State of California

MEMORANDUM

To: PERSONNEL MANAGEMENT LIAISONS

Date: November 4, 1988

Reference Code: 88-97

THIS MEMO SHOULD BE DIRECTED TO:
ALL PERSONNEL OFFICERS

From: Department of Personnel Administration
Classification and Compensation Division

Subject: Revision to the specification and allocation guidelines for the
Materials and Stores Supervisor class series.

Staff from the Classification and Compensation Division is conducting a study of the Materials and Stores Supervisor (M and SS) class series in response to concerns regarding the inconsistencies between the allocation guidelines developed in 1957 and the class specification. Staff believes that these differences are a result of revisions to the class specification without corresponding changes to the guidelines and the onset of collective bargaining. Specifically, the class specification for the M and SS I states that it is the first working supervisory level while the allocation guidelines state that the M and SS I "may" supervise if assigned. The M and SS II class designation is unassigned (U12), although neither the class specification nor the allocation guidelines include a specialist concept. In addition, staff believed it was reasonable to review and validate the quantitative and qualitative factors in the allocation guidelines to reflect changes in warehousing functions which have occurred during the last 30 years.

A survey was conducted of all incumbents in the M and SS series with the exception of the Warehouse Operations Manager classification which is used only in the Department of General Services. Ninety percent of the user departments participated in the survey; 75% of 251 incumbents in the four classes responded to the questionnaire. Departmental input by a group of management and supervisory consultants was solicited during the development of the questionnaire. Additional written responses were also requested for areas of work which incumbents felt were not addressed by the survey. Please note that the survey did not include the classes in the M and SS (Correctional Facility) class series; as such, the proposed changes do not apply to the M and SS (Correctional Facility) class series.

Results of the study indicate that the majority of the positions allocated to the M and SS I class are specialists; they have responsibility for the full range of M and SS duties which include shipping, receiving, storing and issuance of a volume of varied supplies. However, they do not supervise

staff, but may lead one or two warehouse workers/stock clerks/clerical. Therefore, staff recommends revision of the class specification to reflect the actual use of the class.

The M and SS II class has an unassigned bargaining unit designation. The survey indicates that the majority of incumbents are working level supervisors, with a small staff, in charge of a large warehouse setting. Staff recommends that the class specification be revised to state that it is the working supervisory level in the series; the class retitled to M and SS; and the class designated supervisory (S12).

The study also indicates that the M and SS class series perform other duties such as procurement, property control and publications related work. Overall, these duties constitute a small percentage of incumbents' time. Staff recommends including these type of duties as appropriate for the class series. However, the duties of shipping, receiving, storing and issuance of goods remain the major responsibilities of the class series.

Review of the use of the Warehouse Manager I and II shows that in general, allocations appear to meet the class concept for each level. The response rate for incumbents in the Warehouse Manager I and Warehouse Manager II classes was highly represented (90%). The incumbents' responses showed that allocations to these two classes have remained within the general parameters of current allocation guidelines.

It is recommended that the probationary period for the M and SS II, Warehouse Manager I, Warehouse Manager II, and Warehouse Operations Manager, classes be changed from six months to 12 months. Staff believes that in order to adequately evaluate an incumbent, it is necessary to complete a 12-month work cycle of issuing, receiving and storing inventory. Incumbents allocated to these classes work with considerable independence and without direct supervision, which further supports a one-year probationary period.

In addition to revising the class series specification, staff proposes the attached updated allocation guidelines. In summary, the guidelines have been refined to reflect typical characteristics for each level, both quantitative and qualitative. It was also determined that use of the number of different kinds of line items stored represents an allocation factor which better reflects the variety of warehouse functions. Typical staff size in the various warehouse settings has also been identified and included in the guidelines.

Staff requests your review of the attached series specification and allocation guidelines for the class series. It is recognized that there are current allocations which may not meet the proposed specification and guidelines. Specifically, a few allocations to the current M and SS II class may be problematic since the class has an unassigned designation which carries an underlying assumption that there are "specialists" at this level as well as supervisors. In these instances, the Department of Personnel Administration

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staff will work with departments to determine mutually acceptable classification action plans as needed. During the transition phase of the guideline implementation, the Modified Classification Review (MCR) designation for the M and SS II will be changed from MCR I to MCR None for 24 months. At the end of this period, staff will reassess the MCR delegation.

Please submit your input and suggestions by November 28, 1988. When a final product is agreed upon by the majority of users, we will proceed with the Board item process.

Thank you for your cooperation and patience in revising this class series. Please contact Josie Fernandez with your questions or comments. She may be reached on 324-9409 or ATSS 8-454-9409, 1515 "S" Street, North Building, Suite 400, Sacramento, CA 95814.

George P. Lloyd II

George P. Lloyd II, Chief
Classification and Compensation Division

Attachments

ORIGINATOR

State of California

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Classification and Compensation Division

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C A L I F O R N I A S T A T E P E R S O N N E L B O A R D
S P E C I F I C A T I O N

MATERIALS AND STORES SUPERVISOR
Series Specification
(Established January 12, 1972)

SCOPE:

This series specification describes five classes which perform storekeeping and warehousing duties in a redistribution or point-of-use warehouse or supply room.

Storekeeping classes requiring specialized knowledge and application of machine parts storekeeping procedures are allocated to the ~~Machine~~ Equipment Parts Storekeeper Worker series.

Schem	Class	
<u>Code</u>	<u>Code</u>	<u>Class</u>
PB25	1506	Materials and Stores Supervisor I <u>Specialist</u>
PB24	1503	Materials and Stores Supervisor II
PB23	1501	Warehouse Manager I
PB22	1500	Warehouse Manager II
PB21	1497	Warehouse Operations Manager

DEFINITION OF SERIES:

The Materials and Stores Supervisor series of classes describe work concerned with the receipt, storage, issuance, and shipping of a volume of varied supplies. Incumbents may also perform, to a limited degree, procurement, property control, auction preparation and publications work.

Incumbents who are assigned to an institutional setting may assume custodial responsibility for the activities of patients, wards, or inmates assigned to their work area; supervise, train and instruct them in their work; and submit periodic written appraisals of their conduct and productivity.

Materials and Stores Supervisor I Specialist, Materials and Stores Supervisor II, Warehouse Manager I, and Warehouse Manager II may instruct, lead or supervise inmates, wards or resident workers.

ENTRY LEVELS:

Entry into this series is typically through the classes of Stock Clerk or Warehouse Worker.

FACTORS AFFECTING POSITION ALLOCATION:

Level, variety and complexity of work, size of institution or agency served, number and variety of warehousing functions, size of warehouse, volume and variety of items stored, value of inventory, size of staff, supervision received, and supervision exercised are the differentiating factors between individual classes.

DEFINITION OF LEVELS

MATERIALS AND STORES ~~SUPERVISOR~~ I SPECIALIST

This is the ~~first working supervisory~~ advanced journey level in the general storekeeping series. A Materials and Stores ~~Supervisor~~ I Specialist may either (1) supervise lead lower level staff in the receipt, storage, issuance, and shipping of a volume of varied supplies requiring moderately complex storage practices in a redistribution or point-of-use warehouse or supply room; or (2) have charge of stores in a small State institution or agency; or (3) assume equivalent duties and responsibilities in assisting a higher grade warehouse supervisor.

MATERIALS AND STORES SUPERVISOR

This is the ~~second level~~ working level supervisor in the series. A Materials and Stores Supervisor ~~II~~ may either (1) supervise the receipt, storage, issuance, and shipping of a volume of varied supplies requiring complex storage practices in a large redistribution or point-of-use warehouse or supply room, including supervision over a group of assistants; or (2) in an assigned geographic area, to have charge of a large volume of equipment, stores and supplies for a State agency, and to be responsible for the maintenance of control records on the movement of equipment including supervision over a group of assistants; or (3) assume equivalent duties and responsibilities in assisting a higher grade warehousing supervisor manager.

WAREHOUSE MANAGER I

This is the first full supervisory level in this series. Incumbents plan, organize and direct the receipt, storage, issuance, and shipping of a heavy volume of varied supplies in one of the larger and unusually complex complete redistribution or point-of-use warehousing operations, which may include multiple warehouses. Typically incumbents supervise a moderate sized staff of at least five assistants. At this level, incumbents spend a majority of their time directing all the activities of a warehousing operation under administrative direction.

WAREHOUSE MANAGER II

This is the second level of full supervision in this series whose scope of responsibility is statewide or agencywide. Incumbents plan, organize and direct the operation of one of the largest and unusually complex, complete redistribution or point-of-use warehousing functions in State service which includes multiple warehouses. Incumbents typically supervise a large staff of at least eight assistants including subordinate Materials and Stores Supervisors. At this level, incumbents are primarily involved in the resolution of warehousing problems and coordination of multiple warehousing functions.

WAREHOUSE OPERATIONS MANAGER

This position is the administrative and operational head of the Warehousing Section of the Office of Procurement. The incumbent plans, organizes and directs the work of the Warehousing Section of the Office of Procurement; supervises a group of assistants engaged in warehousing activities which include the receipt, storage and issuance of a heavy volume of varied supplies.

MINIMUM QUALIFICATIONS

MATERIALS AND STORES ~~SUPERVISOR~~ I SPECIALIST

Either I

One year of experience performing the duties of a Stock Clerk or Warehouse Worker in California state service.

Or II

Two years of experience in a supply room or warehouse in work involving the receipt and issuance of a large volume of varied commodities. (Experience in California state service applied toward this requirement must include at least one year at a level of responsibility at least equivalent to that of Stock Clerk.)

MATERIALS AND STORES SUPERVISOR ~~II~~

Either I

One year of experience performing the duties of a Materials and Stores ~~Supervisor~~ Specialist in California state service.

Or II

Three years of experience in a supply room or warehouse in work involving the receipt, storage, issuance, and shipping of varied supplies or food commodities. (Experience applied toward this requirement must include at least one

year of supply room or warehouse supervisory responsibilities equivalent in level and responsibilities to Materials and Stores Supervisor I Specialist.)

WAREHOUSE MANAGER I

Either I

One year of experience performing the duties of a Materials and Stores Supervisor II or Prison Canteen Manager I in California state service. or

Two years of experience performing the duties of a Materials and Stores Supervisor I Specialist in California state service.

Or II

Three years of experience in a storeroom or warehouse which must have included or been supplemented by one year of responsible supervisory or technical experience related to reordering, storing, distributing, or controlling the inventory of a wide variety of materials for a large organization. (Experience in California state service applied toward the supervisory requirement must include at least one year in a class at a level of responsibility equivalent to that of Materials and Stores Supervisor II.)

WAREHOUSE MANAGER II

Either I

One year of experience performing the duties of a Warehouse Manager I or Prison Canteen Manager II in California state service. or

Two years of experience performing the duties of a Materials and Stores Supervisor II or Prison Canteen Manager I in California state service.

Or II

Four years of experience in a storeroom or warehouse which must have included or been supplemented by two years of responsible supervisory or technical experience related to reordering, storing, distributing, or controlling the inventory of a wide variety of materials for a large organization. (Experience in California state service applied toward the supervisory requirement must include at least one year in a class at a level of responsibility equivalent to that of Warehouse Manager I.)

WAREHOUSE OPERATIONS MANAGER

Either I

One year of experience performing the duties of a Warehouse Manager II in California state service.

Or II

Broad and extensive (more than five years) responsible managerial or technical experience related to reordering, storing, distributing, or controlling the

inventory of a wide variety of materials for a large organization. (Experience in California state service applied toward the supervisory requirement must include at least one year in a class at a level of responsibility equivalent to that of Warehouse Manager II.)

ADDITIONAL DESIRABLE QUALIFICATIONS

ALL LEVELS:

Education equivalent to completion of the twelfth grade; completion of college-level work in the fields of accounting and/or business administration.

KNOWLEDGE AND ABILITIES

MATERIALS AND STORES ~~SUPERVISOR~~ I SPECIALIST

MATERIALS AND STORES SUPERVISOR ~~II~~

Knowledge of: Modern warehousing methods and practices, including the keeping of, receiving, shipping, and inventory records; freight rates and classifications; Office of Procurement specifications; regulations involved with consolidated freight shipments, stock array systems; freight claim procedure; operation of motorized material handling equipment; inventory and quality control.

Ability to: Read and write English at a level required for successful job performance; perform heavy physical labor; estimate possible future demands of various supplies based upon past needs; work independently; work and communicate effectively and with those contacted in the work; direct the work of others; keep accurate records and prepare reports of work done; analyze situations accurately and take effective action.

~~MATERIALS AND STORES SUPERVISOR I~~

Knowledge of: All of the above.

Ability to: All of the above, and to learn the operation of forklifts and other types of motorized material handling equipment.

~~MATERIALS AND STORES SUPERVISOR II~~

Knowledge of: All of the above, and department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and determine whether incoming supplies meet the standards set up in the Office of Procurement and agency specifications; supervise the work of a group of assistants; operate forklifts and other types of motorized material handling equipment; effectively contribute to the department's affirmative action objectives.

WAREHOUSE MANAGER I

WAREHOUSE MANAGER II

Knowledge of: All of the above, and warehouse management principles and procedures; methods of packing and shipping a wide variety of commodities; inventory control and statistical forecasting techniques; work standards development; cost-centered warehousing techniques; proper methods of storing supplies requiring both normal and special storekeeping practices; principles of personnel management and supervision; principles of governmental budgeting.

Ability to: All of the above, and plan and direct the work of others; meet and deal effectively with those contacted in the course of business; determine whether incoming supplies meet the standards set up in the Office of Procurement and agency specifications; direct the work of a group of assistants; develop a storekeeping activity budget; estimate possible future demands of various supplies based upon past needs; keep accurate records and prepare

~~reports of work done; speak and write effectively; analyze situations accurately and take effective action.~~

~~WAREHOUSE MANAGER II~~

~~WAREHOUSE OPERATIONS MANAGER~~

Knowledge of: All of the above, and department's Affirmative Action Program objectives; a manager's role in the Affirmative Action Program and the processes available to meet affirmative action objectives.

Ability to: All of the above, and effectively contribute to the department's affirmative action objectives.

~~WAREHOUSE OPERATIONS MANAGER~~

Knowledge of: All of the above, and management information systems for multiple warehouse operations; quality control inspection and testing; purchasing principles and practices; and organizational principles.

Ability to: All of the above, and plan, direct and coordinate the operation of a multiple warehouse system; ~~direct the work of a group of assistants, estimate possible future demands in various supplies based upon past needs, speak and write effectively, meet and deal effectively with those contacted in the course of business; keep accurate records and prepare reports of work done.~~

SPECIAL PERSONAL CHARACTERISTICS

MATERIALS AND STORES ~~SUPERVISOR~~ I SPECIALIST

MATERIALS AND STORES SUPERVISOR ~~II~~

Strength, good physical agility, and willingness to do heavy manual labor.

CLASS HISTORY

<u>Class</u>	<u>Date</u>	<u>Date</u>	<u>Title</u>
	<u>Established</u>	<u>Revised</u>	<u>Changed</u>
Materials and Stores Supervisor I <u>Specialist</u>	4/12/47	7/11/79	1/12/72
Materials and Stores Supervisor II	4/12/47	7/11/79	1/12/72
Warehouse Manager I	2/2/57	7/11/79	1/12/72
Warehouse Manager II	4/12/47	7/11/79	1/12/72
Warehouse Operations Manager	2/1/52	9/20/78	1/12/72

MATERIALS AND STORES ALLOCATION GUIDELINES

	Materials and Stores Specialist	Materials and Stores Supervisor	Warehouse Manager I	Warehouse Manager II
Scope of Assignments	As the advanced journey level, incumbents typically are in charge of a medium sized warehouse performing routine warehousing duties including the shipping, receiving and storage of a variety of goods. As an assistant to a higher level materials and stores supervisor, incumbents are responsible for a specific portion of a larger warehouse function.	This is the working supervisor level. Incumbents have charge of a large warehouse which requires a small sized staff. In the largest warehouse setting, incumbents may serve as a first line supervisor.	This is the first full supervisory level. Incumbents have charge of a larger warehouse setting which may include multiple warehouses. May supervise a subordinate Materials and Stores Specialist/Supervisor.	Incumbents at this level are in charge of the largest warehouse setting typically with multiple warehouses and subordinate Materials and Stores Supervisor/ Specialist. Responsible for goods used statewide or agencywide.
Warehouse Characteristics	Size - 5,000 to 12,000 square feet. Number of line items - up to 1,000. Average yearly inventory - \$500,000 to \$750,000.	Size - 12,000 to 40,000 square feet. Number of line items - 1,000 to 2,000. Average yearly inventory - \$750,000 to \$1 million.	Size - 25,000 to 75,000 square feet. Number of line items - 1,000 to 2,000. Average yearly inventory - \$1 to \$3 million.	Size - greater than 75,000 sq. ft. Number of line items - greater than 2,000. Average yearly inventory - at least \$2 million.
Supervision Exercised	None, lead only.	Supervises a small group of three to five warehouse/clerical staff	Supervises five to eight warehouse/clerical staff which may include lower level Materials and Stores Specialists/Supervisors.	Supervises at least eight warehouse/clerical staff including a subordinate Materials and Stores Supervisor.
Supervision Received	When in charge of a warehouse, incumbents work under the general supervision of a generalist (staff services, business services) or program class position. As an assistant to a higher level materials and stores supervisor, works under the direction of a Warehouse Manager I, II or Warehouse Operations Manager.	Incumbents receive general direction from a non-allied materials and stores supervisor, e.g., staff services, business services, program supervisor. Or in the largest warehouse setting, reports to a warehouse manager.	Under administrative direction of a non-allied materials and stores administrator, incumbents are responsible for the complete warehousing function. Responsible for all the day-to-day planning of the warehouse activities. Occasionally consults with higher level management. Decisions made at this level may have a department-wide impact.	Incumbents work under general direction of a non allied materials and stores administrator. Responsible for all warehouse related decisions, consulting management only on those issues impacting departmental policy.

Complexity
of Work/
Responsibility
for Decisions and
Recommendations

Materials and Stores Specialist

Stores dealt with usually require normal and routine storekeeping practices of storing, issuing and receiving. Items handled are in general use, easily described and identified. The nature and extent of responsibility may be further limited by assignment to specific activities in the storekeeping function, such as receiving from carriers and checking content, or filling requisitions and maintaining inventory records.

Materials and Stores Supervisor

Primary responsibility is handling of standard storing practices for a variety and volume of items; however, some problems of temperature control, insect infestation, perishability, deterioration, pilferage and quality have to be solved and recommendations regarding special practices made. This is especially true when this level is the highest in the agency or institution.

Positions assigned to work under a higher level storekeeper may be delegated responsibility for a combination of activities including independent inspection, storage and receipt of a variety of supplies where perception and judgement is required. (This involves such things as quality and type of medical supplies and food items handled.)

Decisions regarding estimates of future need become evident at this level and errors may cause shortages of supplies or spoilage problems.

Responsibility for shipping, including procurement, more frequent supplier contact than at lower level and selection of method of shipment are frequent duties.

Warehouse Manager I

Decision regarding special store keeping practices are every day problems at this level. The problems at the Materials and Stores Supervisor level are all present, but to a greater degree. Due to the larger number of population served, a greater quantity of different items is handled and problems of estimating needs, consumption rates and stock turnover are more acute, requiring a greater degree of decision making responsibility than at lower levels.

Because of the large size of the storekeeping functions and the responsibility of keeping up to date on developments in other agency functions and their needs for stores services, possibility of dislocation or breakdown in service has to be anticipated and avoided.

Decisions regarding estimates of future needs affect the entire storekeeping function as well as other functions dependent on service. Errors could result in disruption of service and create storage problems affecting the entire agency.

May have supplementary responsibilities of property control fabrication and repair of equipment. Greater skill required in coordinating the complex details of the entire stores function, including greater supplier contact due to buying responsibility.

Warehouse Manager II

Same as the Warehouse Manager I, but with the greatest emphasis on special storekeeping practices. Inadequate action may result in serious losses and breakdown in service to agency or agencies.

A significant distinguishing feature is responsibility for supplementary duties such as warehousing or industrial and manufacturing equipment and stock, fabrication of materials and property control.

May service geographically dispersed units of own agency or other agencies. May handle disposition of surplus warehouse material by accumulating, classifying, and advertising materials, inviting and awarding bids, and making property survey reports.

Requires greater skill than lower levels in solving more diverse operating problems.

	Materials and Stores Specialist	Materials and Stores Supervisor	Warehouse Manager I	Warehouse Manager II
Typical Duties	<p>Performs the full range of warehousing duties including shipping, receiving, storage and inventory control for a department. May on occasion perform procurement and property control duties in a regional setting. Incumbents may act in a lead capacity over one or two warehouse/clerical staff.</p>	<p>As a working supervisor, incumbents have charge of a small staff and spend a significant amount of their time providing supervision and resolving shipping, receiving and storage problems. Personally performs shipping and receiving duties on a limited basis. May occasionally search for and secure goods, particularly in a regional setting.</p>	<p>Plans, organizes and directs the activities of a larger warehouse which may include specialized warehousing functions such as storage and inventory of property, printing and distribution of publications, fabrication and repair of property and equipment. A significant portion of incumbents' time is spent resolving warehousing problems such as return of damaged goods, tracking shipped goods, unusual storage requirements.</p>	<p>Plans, organizes and directs the largest warehousing function which requires a large staff and lower level supervisor(s). Primarily involved in the resolution of warehousing problems and coordination of a number of warehousing functions which may include specialized areas such as the production and distribution of publications, fabrication and repair of equipment/furniture, property control, procurement, preparation for auctions/sales. May also have administrative responsibilities such as budget development, hiring and assigning personnel and operations planning.</p>

EXCLUSIONS

1. Positions which have as their primary responsibility the purchasing of materials, supplies, and equipment should be allocated to the Buyer classification series.
2. Positions which have as their primary responsibility the establishment and maintenance of property accounts and records of property location should be allocated to the Property Controller class series.
3. Positions which have responsibility for a variety of business services and general administrative functions should be allocated to the Business Services Officer series.