

Final



North Carolina Procurement Transformation

Organizational Model

March 11, 2011

Table of Contents

- Executive Summary
- Approach and Collection Process
- Recommended Organizational Structure
- Recommended Job Profiles
- Full-Time Equivalent Analysis
- Appendix

Executive Summary

There are twelve organizational-specific areas that the State of North Carolina should address to improve the efficiency and effectiveness of the Procurement function.

1. Merge the Division of Purchase & Contract and IT Procurement organizations into a single Procurement organization called State Procurement
2. Integrate the Historically Underutilized Business (HUB) Office into State Procurement to further support achieving the State of North Carolina's supplier diversity objectives
3. Establish a Strategic Sourcing group within State Procurement with deep sourcing expertise to drive best value results
4. Establish an Operations group within State Procurement to provide a robust operational support framework for state agencies, community colleges, and other stakeholders
5. Establish a dedicated Procurement Legal Counsel group within State Procurement to review appropriate solicitations and contracts, and provide consistent guidance to the Procurement function on North Carolina statutes, administrative codes, executive orders, and policies
6. Deploy recommended job titles and job profiles for procurement-related positions within State Procurement, and then identify qualified resources to fill the new positions
7. Deploy standardized job titles and job profiles for procurement related positions across state agencies and community colleges
8. Execute a standardized job profile management process to ensure ongoing relevancy to the needs of the Procurement function and maintain consistency across state agencies and community colleges
9. Utilize Career Track Mappings within the Procurement function to facilitate improved planning and achievement of career advancement opportunities for employees
10. Develop and deploy a comprehensive training solution for resources performing procurement related activities to provide them with the right skills to be successful within their roles
11. Finalize and deploy updated salary grades for Procurement roles to better attract, retain, and incentivize appropriately skilled resources that are critical for transforming the Procurement function and sustaining the benefits to be derived through an enhanced workforce
12. Develop individual performance metrics from the recommended Procurement Balanced Scorecard for inclusion in job descriptions to increase accountability and enable more objective performance evaluations

The organizational recommendations align to the Procurement Vision and Guiding Principles that were developed as part of the Strategy & Governance workstream.

Rec. #	Recommendation	Best Value	Customer Focus	Delivery Excellence	Compliance and Accountability	Operational Efficiency	Workforce Excellence	Strategic Planning
OD.1	Merge the Division of Purchase & Contract and IT Procurement organizations into a single Procurement organization called State Procurement			✓	✓	✓	✓	✓
OD.2	Integrate the Historically Underutilized Business (HUB) Office into State Procurement to further support achieving the State of North Carolina’s supplier diversity objectives		✓	✓	✓	✓		✓
OD.3	Establish a Strategic Sourcing group within State Procurement with deep sourcing expertise to drive best value results	✓	✓	✓		✓	✓	✓
OD.4	Establish an Operations group within State Procurement to provide a robust operational support framework for state agencies, community colleges, and other stakeholders		✓	✓	✓	✓	✓	
OD.5	Establish a dedicated Procurement Legal Counsel group within State Procurement to review appropriate solicitations and contracts, and provide consistent guidance to the Procurement function on North Carolina statutes, administrative codes, executive orders, and policies		✓	✓	✓	✓	✓	
OD.6	Deploy recommended job titles and job profiles for procurement-related positions within State Procurement, and then identify qualified resources to fill the new positions			✓	✓	✓	✓	
OD.7	Deploy standardized job titles and job profiles for procurement related positions across state agencies and community colleges			✓	✓	✓	✓	

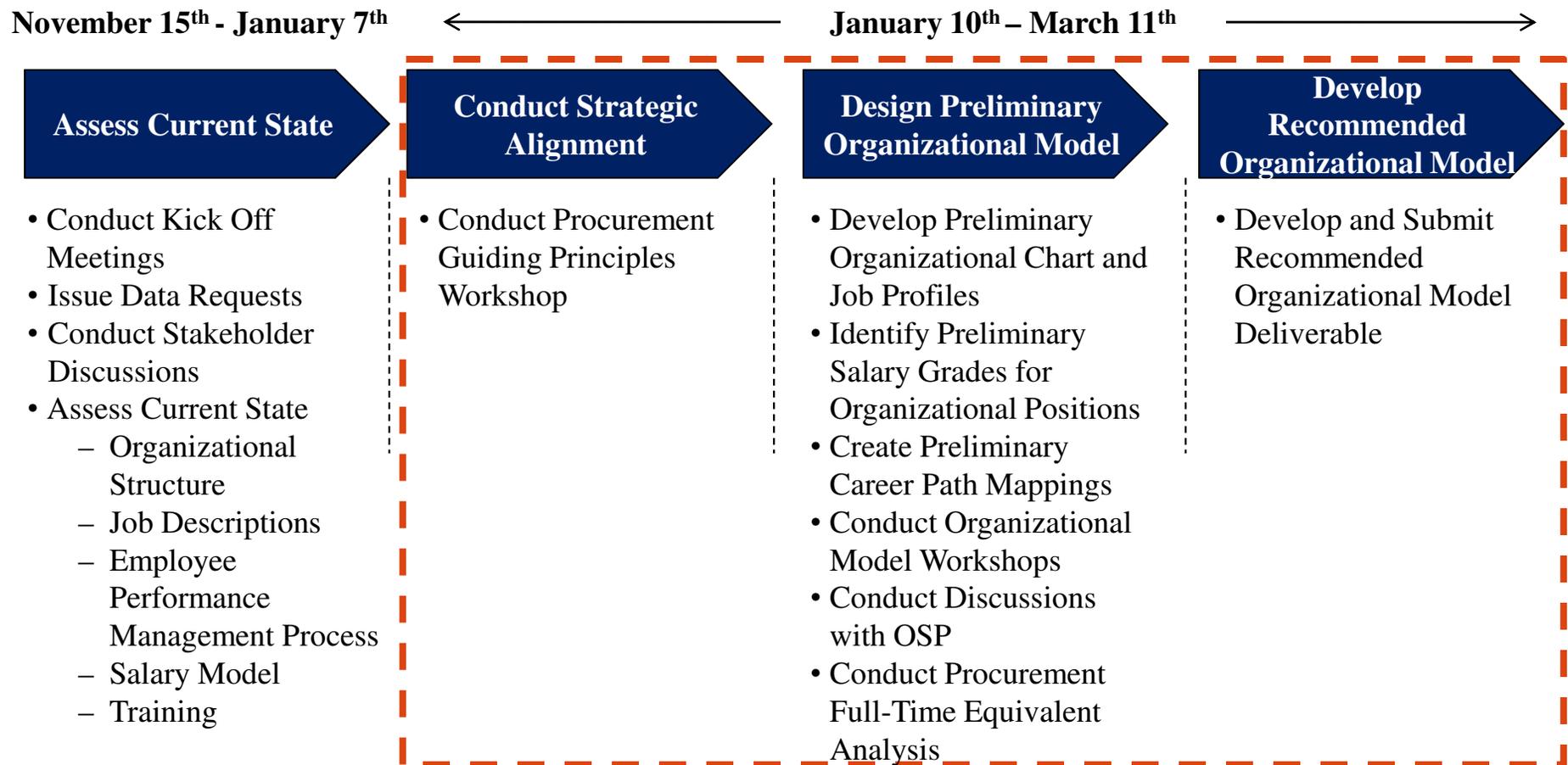
Rec. #	Recommendation	Best Value	Customer Focus	Delivery Excellence	Compliance and Accountability	Operational Efficiency	Workforce Excellence	Strategic Planning
OD.8	Execute a standardized job profile management process to ensure ongoing relevancy to the needs of the Procurement function and maintain consistency across state agencies and community colleges			✓	✓	✓	✓	
OD.9	Utilize Career Track Mappings within the Procurement function to facilitate improved planning and achievement of career advancement opportunities for employees						✓	
OD.10	Develop and deploy a comprehensive training solution for resources performing procurement related activities to provide them with the right skills to be successful within their roles	✓	✓	✓	✓	✓	✓	✓
OD.11	Finalize and deploy updated salary grades for Procurement roles to better attract, retain, and incentivize appropriately skilled resources that are critical for transforming the Procurement function and sustaining the benefits to be derived through an enhanced workforce						✓	
OD.12	Develop individual performance metrics from the recommended Procurement Balanced Scorecard for inclusion in job descriptions to increase accountability and enable more objective performance evaluations			✓	✓	✓	✓	

Table of Contents

- Executive Summary
- Approach and Collection Process
- Recommended Organizational Structure
- Recommended Job Profiles
- Full-Time Equivalent Analysis
- Appendix

Approach and Collection Process

The team followed a structured approach to collect the information needed to develop the recommended Organizational Model for the Procurement function.



The list below details key activities involved in determining the recommended Organizational Model, including developing the Procurement Guiding Principles, conducting multiple workshops, and having discussions with the Office of State Personnel.

—Key Organizational Model Activities—

- Conducted survey discussions with over 60 key procurement stakeholders
- Assessed and outlined current state procurement organizational charts, positions counts, job profiles, and salary grades
- Conducted workshop to develop the Procurement function’s Guiding Principles
- Created draft of Organizational Model recommendation, job profiles, salary grades, and job profile management process
- Collected benchmarks from other states around organization structures and compensation
- Conducted weekly meetings with the Office of State Personnel (OSP) to discuss recommended organizational charts, positions counts, job profile management process, and salary grades
- Held Organizational Model workshops to review preliminary organizational charts, positions counts, job profile management process, and salary grades
- Issued information request to Executive Branch state agencies and community colleges to gain better insights into total number of positions performing procurement related activities; this information will be helpful in developing training plans to provide resources with the skills they need to be successful

Table of Contents

- Executive Summary
- Approach and Collection Process
- Recommended Organizational Structure
- Recommended Job Profiles
- Full-Time Equivalent Analysis
- Appendix

Recommended Organizational Structure

Organizational Model Overview

The Organizational Model, which supports the execution of the Operating Model and Governance Model, describes the recommended structure, roles and responsibilities, key skills, and career paths for resources within the Procurement function.

Operating Model



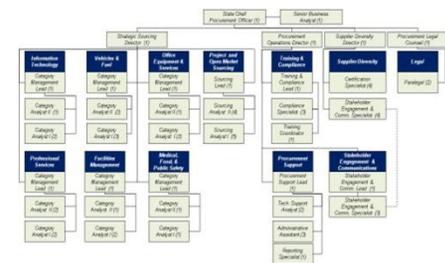
Describes what procurement capabilities are needed, how the work is **executed**, and **interfaces** with other groups within the State

Governance Model



Defines **key decision rights**, **leadership oversight**, and **performance mgmt** to execute and drive compliance to strategy

Organizational Model



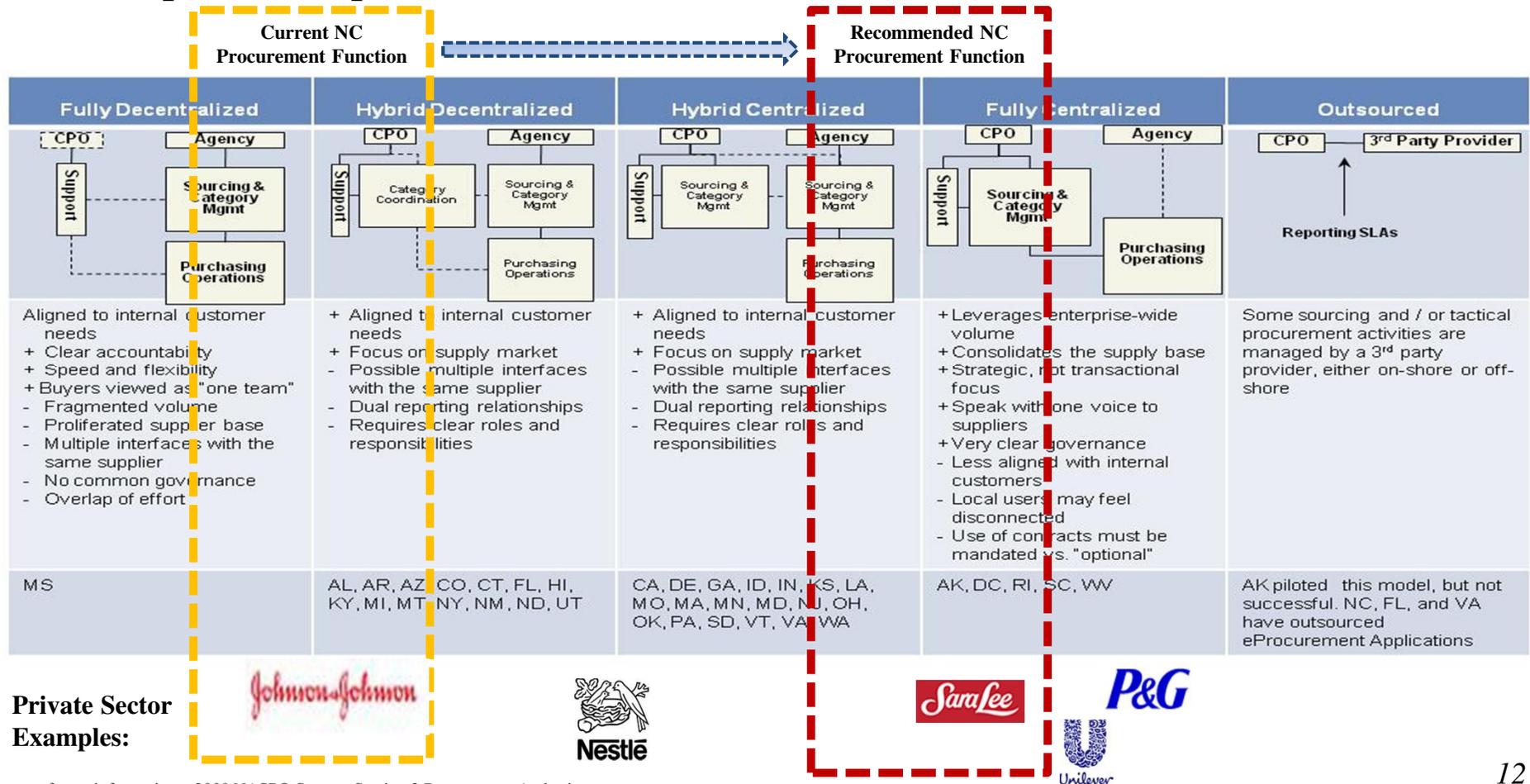
Describes the **structure**, **roles**, **responsibilities**, **career paths** and **key skills** within the procurement organization

The recommended Organizational Model provides an integrated and collaborative Procurement organization with deep expertise to more effectively meet the needs of internal and external stakeholders.

- Provides organizational platform for Procurement to achieve its Vision and meet customers' needs through the integration of Purchase & Contracts, IT Procurement, and the HUB Office into a single central procurement authority
- Supports delivery of best value solutions through the formation of centrally-led sourcing and management groups focused by category / industry and ongoing procurement analysis
- Clearly defines key responsibilities, skills needed, and performance metrics for Procurement roles through standardized procurement titles and job profiles
- Enables the delivery of proactive customer service by having dedicated resources focused on communications and outreach activities that strengthen stakeholder relationships and two way communications
- Provides multiple career path options for Procurement employees to improve level of career satisfaction and opportunities for growth
- Includes competitive salary grades for many positions to better reflect the experience, expertise, and level of management responsibility needed to successfully transform and sustain the Procurement function by attracting and retaining top talent

Recommended Organizational Structure Conceptual Organizational Design Options

The recommended organizational structure moves the NC Procurement function toward a more centralized model, which is consistent with many leading practice organizations across the public and private sector with similar characteristics.



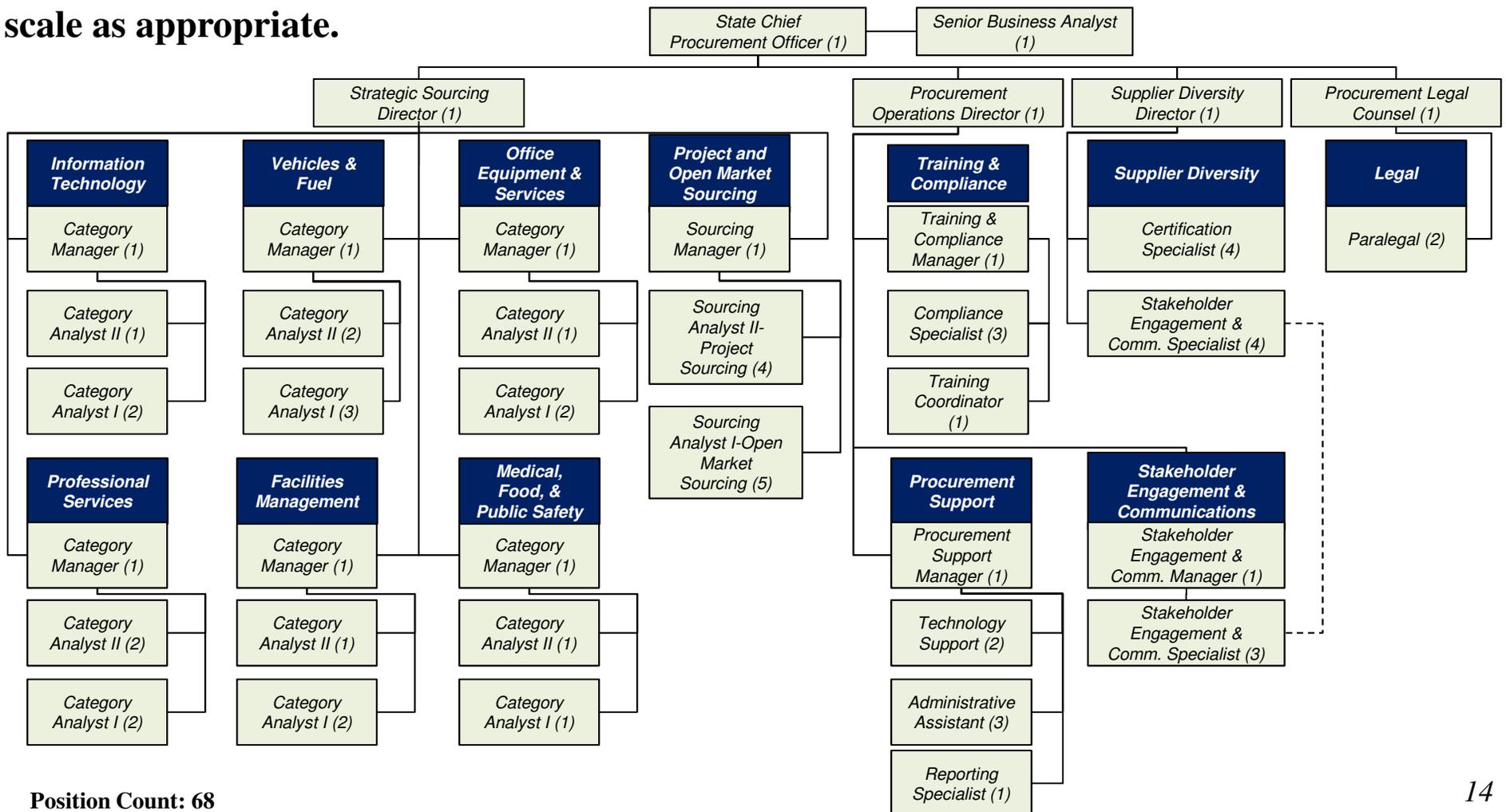
Recommended Organizational Structure Central Procurement Authority Benchmarks

Leading practice components were pulled from Procurement organizations in Florida, Georgia, Massachusetts, and Pennsylvania to develop the recommended organizational structure for State Procurement.

Component	Florida	Georgia	Massachusetts	Pennsylvania	North Carolina
State Procurement Executive	X	X	X	X	X
Operations Director	X			X	X
Dedicated Legal Group	X		X		X
Segmentation by Category/Industry	X	X	X	X	X
Dedicated Training Group	X	X	X		X
Integrated Supplier Diversity Group			X		X
Customer Relationships Group		X			X

Recommended NC State Procurement Organization Structure

The recommended State Procurement organization is sized to efficiently and effectively address the steady state business needs of the State, while maintaining the flexibility to scale as appropriate.



The recommended State Procurement organization contains eight integrated groups organized by function to achieve Procurement’s vision.

Groups		Key Responsibilities
1	Senior Business Analyst	<ul style="list-style-type: none"> • Provide internal management advisory support to the State Chief Procurement Officer and the leadership team • Identify and investigate opportunities for continuous improvement across the Procurement function • Conduct trend analytics to provide insights into the Procurement organization performance against targets
2	Strategic Sourcing Category Group	<ul style="list-style-type: none"> • Identify, plan, execute, and manage strategic sourcing initiatives for targeted categories of goods and services that results in state term contracts • Provide expert knowledge of industry and marketplace drivers • Execute Category Management activities including contract management and supplier relationship management
3	Project and Open Market Sourcing	<ul style="list-style-type: none"> • Provide Strategic Sourcing subject-matter expertise for sourcing events for complex, high value procurements that are specific to an agency or community college • Form and manage cross functional teams to conduct strategic sourcing of high-value, complex goods and services, or projects not managed by the Strategic Sourcing group • Manage above-delegation open market requisitions for the state agencies, community colleges, and universities • Form and manage cross functional teams to conduct sourcing of open market requisitions to deliver agency specific contracts or POs
4	Training & Compliance	<ul style="list-style-type: none"> • Participate in the identification of training and lead the delivery of a procurement-related training curricula based upon training needs and compliance reviews • Maintain the Purchasing Manual and contract templates, engaging the appropriate stakeholders as needed • Conduct Compliance Reviews of the state agencies and community colleges
5	Supplier Diversity	<ul style="list-style-type: none"> • Support the Strategic Sourcing and Project and Open Market Sourcing teams to integrate HUB and North Carolina-based suppliers • Support Procurement with logistical coordination of outreach activities, internal training, supplier diversity data system verification and Procurement related analysis • Provide certification and support to HUB suppliers
6	Legal	<ul style="list-style-type: none"> • Review solicitations and contracts to ensure adherence to North Carolina laws and Procurement policies, conferring with the Attorney General as needed/required • Develop and maintain a single set of legal terms and conditions with guidelines for reviewing and approving variances • Manage legal reviews and provide procurement-related legal support services for State Procurement upon request • Provide statute interpretation services for the Procurement function, conferring with the Attorney General as needed • Support Strategic Sourcing and Project and Open Market Sourcing teams upon request, conferring with the Attorney General as needed
7	Procurement Support	<ul style="list-style-type: none"> • Support procurement technology tools managed by State Procurement • Provide administrative support to senior leadership • Support performance data management within the Procurement function • Develop standardized data analytics processes, reporting templates and ad hoc reports to be utilized by the Procurement function
8	Stakeholder Engagement & Communications	<ul style="list-style-type: none"> • Manage relationships and outreach activities with customers (e.g., state agencies, community colleges, universities, LEAs, local governments, suppliers) • Develop and manage the Communications Plan for Procurement, including supporting internal and external surveys

Recommended Organizational Structure State Procurement Category Teams' Scope

Six strategic sourcing category teams focus on developing the right state term contracts to address the key sub-categories of goods and services used across the State.

Category Team	Key Subcategories
Information Technology	<ul style="list-style-type: none"> • Microcomputers and Peripherals • Mass Storage Components • UNIX Workstations/Servers and Peripherals • Network Equipment • Telephony Premise Equipment and Maintenance • Radios • Printers and Peripherals • Software • Ruggedized Laptops • Paging Services and Equipment • Audio/Visual Equipment (includes cameras) • Cellular Telephone Service and Equipment
Vehicles & Fuel	<ul style="list-style-type: none"> • Fuel (all types of tanker and tank wagon) • School Buses (includes activity buses) • Fuel Card • Natural Gas • Autos and Light Trucks (includes law enforcement vehicles) • Heavy / Industrial Trucks (includes dump trucks) • Transit Buses • Tires (includes retreads) • Mowers • Tractor Trailers • Tractors • Rental Vehicles • Industrial Equipment Rental (NEW)

Final Recommended Organizational Structure State Procurement Category Team's Scope (continued)

Category Team	Key Subcategories
Office Equipment & Services	<ul style="list-style-type: none"> • Paper and Envelopes • Office and Education Supplies (includes toner cartridges, calculators, laminators, transcribing equipment, transparency film, camera film) • Furniture • Copiers • Carpet • Mattresses • Procurement / Travel Cards • Freight (NEW)
Professional Services	<ul style="list-style-type: none"> • IT Services (includes short term IT staffing) • Advertising and Marketing Services (NEW) • Health Services (NEW) • Print (NEW) • Administrative Services (NEW) • Architect and Engineering Services (NEW)
Facilities Management	<ul style="list-style-type: none"> • Maintenance, Repair & Operation Supplies (includes cleaning supplies, filters, batteries, electrical supplies, locks, blinds, lighting supplies) • Napkins and Paper Products • Paint and Paint Materials • Hand Held Tools • Plastic Trash Bags • Electronic Equipment Recycling Services • Building Management Services (NEW)
Medical, Food, & Public Safety	<ul style="list-style-type: none"> • Drugs and Medicines • Medical / Dental / Lab Equipment and Supplies • Ammunition • External Defibrillators • Food (NEW) • Firearms and Rifles (NEW)

Recommended Organizational Structure State Procurement Sizing Considerations

Although several factors and assumptions were utilized to determine the recommended size of the State Procurement organization structure in the steady state, the actual staffing of the positions will need to be fluid in the near term to match current needs.

Major Steady State Sizing Factors

- Amount of managed spend on state term contracts
- Number of state term contracts managed
- Number of suppliers managed
- Complexity of managed spend (e.g., mix of services and goods)
- Duration of state term contracts
- Seasonality/lifecycle of goods/services procured

Assumptions

- The organizational structure represents the steady state scenario
- Legislative affairs are supported by DOA
- Procurement Legal Counsel resources are dedicated to State Procurement and confer with the DOA Legal Counsel and Attorney General's Office as required or needed
- The organizational structure does not include E-Procurement support resources currently provided by third party

The recommended State Procurement organizational structure emphasizes deeper Procurement expertise with a more efficient use of support resources.

Current State Positions	P&C	IT Procurement	HUB	Total
Managerial	6	2	2	10
Procurement Professionals	17	9	-	26
Support	24	1	10	35
Total # of Positions	47	12	12	71



	Future State Positions	Total
Managerial	State Chief Procurement Officer	14
	Strategic Sourcing Director	
	Procurement Operations Director	
	Supplier Diversity Director	
	Category Manager	
	Sourcing Manager	
	Training & Compliance Manager	
	Procurement Support Manager	
	Stakeholder Engagement & Communications Mgr.	
Procurement Professionals	Category Analyst I & II	29
	Sourcing Analyst I & II	
Support	Senior Business Analyst	25
	Procurement Legal Counsel	
	Paralegal	
	Compliance Specialist	
	Training Coordinator	
	Certification Specialist	
	Stakeholder Engagement & Comm. Specialist	
	Technology Support	
	Administrative Assistant	
	Reporting Specialist	
Total # of Positions		68

Recommended Organizational Structure

Entity Procurement Positions & Sizing Factors

Standard position titles and key sizing factors were developed to improve consistency of Procurement roles and support the appropriate sizing of procurement organizations across state agencies and community colleges.

Recommended Key Procurement Positions

- Procurement Director
- Procurement Officer
- Purchasing Specialist III
- Purchasing Specialist II
- Purchasing Specialist I
- Contract Specialist
- Contract Technician

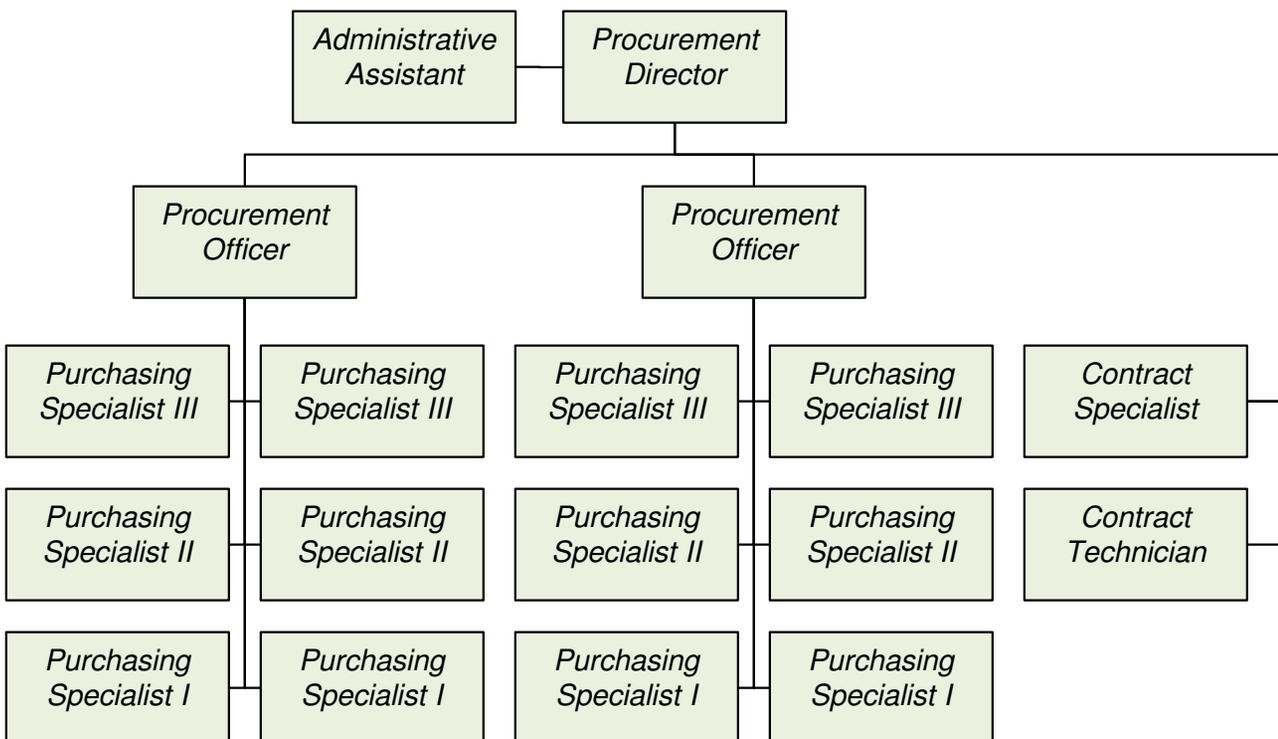
Key Sizing Factors

- Number of suppliers managed
- Amount of managed spend
- Complexity of spend (e.g., mix of services and goods)
- Level of P-Card usage
- Usage of E-Procurement versus Direct Pay
- Total number of requisitions
- Number of non-contract requisitions below delegation
- Number of entity awards requested
- Seasonality/lifecycle of goods/services procured
- Number of entity-specific term contracts managed
- Duration of entity-specific term contracts managed
- Number of formal bids (> \$10,000) managed
- Geographic location of requisitioners
- Number of requisitioners supported
- Number of internal reporting requirements (e.g., statute mandates)

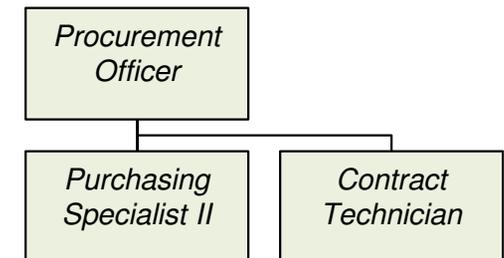
Recommended Organizational Structure Example Entity Organization Charts

Although custom organization charts will need to be developed during the implementation phase for each state agency and community college based on the identified sizing factors, the three organizational charts below provide representative examples.

EXAMPLE A: Large State Agency/ Community College



EXAMPLE B: Medium State Agency/ Community College



EXAMPLE C: Small State Agency/ Community College



* Position responsible for all procurement and contract administration related activities for the entity

Table of Contents

- Executive Summary
- Approach and Collection Process
- Recommended Organizational Structure
- Recommended Job Profiles
- Full-Time Equivalent Analysis
- Appendix

Recommended Job Profiles

Recommended job profiles were developed for procurement roles in State Procurement, state agencies, and community colleges.

Job Profiles Include:

- **Position Title:** Standardized title used across Procurement and authorized by OSP
- **Job Description:** Provides a high-level summary of the position
- **Key Responsibilities:** Describes main duties of the position
- **Key Skills:** Lists must-have-skills to be successful in the position
- **Salary Grade:** Provided for future inclusion once salary grades have been approved
- **Minimum Education & Experience Levels:** Minimum qualifications required to be considered for the position

-State Chief Procurement Officer-

Job Description

The State Chief Procurement Officer (SCPO) serves as the public leader of the State’s Procurement function and is responsible for the procurement of goods and services by Executive Branch state agencies and community colleges. The SCPO works with key stakeholders to maintain and revise the Procurement function’s overall strategy, vision, mission, and guiding principles to ensure alignment with current needs of the State. In addition, the SCPO manages senior leadership level relationships across the State to communicate and obtain support of Procurement initiatives. The SCPO also develops measures to ensure that procurement processes, ethics, and supplier relationship management guidelines are followed. The SCPO manages the Strategic Sourcing Director, Procurement Operations Director, Supplier Diversity Director, and Procurement Legal Counsel. Success in this position involves a deep understanding of the Procurement function, procurement strategy development, and the ability to influence key stakeholders.

Key Responsibilities

- Champion the Procurement function’s vision, mission, and guiding principles with stakeholders to achieve targeted business outcomes
- Serve as the public leader of the State’s Procurement function with state agencies, community colleges, universities, LEAs, local governments, suppliers, the legislature, and other external stakeholders
- Responsible for procurement of goods and services by Executive Branch state agencies and community colleges
- Manage relationships with internal and external stakeholders to communicate and obtain support of the value delivered by the Procurement function
- Build cross-organization relationships to drive continuous improvements and focus on customer service

Key Skills

- Ability to Drive and Adapt to Change
- Internal Stakeholder Collaboration
- Leadership
- Oral & Written Communications
- Sourcing Strategy Formulation & Implementation
- Strategic Planning
- Supplier Relationship Management (SRM) & Development

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience leading public or private sector procurement organization(s) comparable to the complexity of the State of North Carolina

-Senior Business Analyst-

Job Description

The Senior Business Analyst reports directly to the State Chief Procurement Officer. This role provides internal management advisory support to the State Chief Procurement Officer and the leadership team, helping to identify opportunities for continuous improvement across the entire Procurement function. The Senior Business Analyst manages the timely development and reporting of the Balanced Scorecard and provides support to the Procurement Governance Team (defined in Governance Model Deliverable) as needed. Success in this position involves a deep understanding of the Procurement function, business performance measure development/management, and internal stakeholder management.

Key Responsibilities

- Support the State Chief Procurement Officer in transforming the Procurement function
- Manage reporting of Balanced Scorecard to Procurement function, including identifying recommended changes to metrics being tracked
- Support the Procurement governance process (e.g., documenting and tracking Procurement Governance Team meeting action items)
- Identify and investigate continuous improvement opportunities for the entire Procurement function
- Lead ad hoc projects assigned by the State Chief Procurement Officer

Key Skills

- Business Performance Measurement
- Business Process Design & Continuous Improvement
- Data Analysis
- Financial Modeling
- Internal Stakeholder Collaboration
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications
- Procurement Law, Policy, and Process Understanding
- Project Management
- Strategic Planning

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Strategic Sourcing Director-

Job Description

The Strategic Sourcing Director reports directly to the State Chief Procurement Officer and assists in developing, implementing, and communicating the Procurement Sourcing strategy. The Strategic Sourcing Director manages the activities of the Category Managers and the Sourcing Manager to achieve the targeted business outcomes. This role is responsible for developing, communicating, and maintaining the multi-year Strategic Sourcing Plan. The Strategic Sourcing Director is also responsible for supporting relationships with strategic suppliers where appropriate (e.g., contract negotiations). Success in this position involves a deep understanding of Strategic Sourcing, procurement strategy development, and the ability to influence key stakeholders.

Key Responsibilities

- Develop, implement, and communicate the Strategic Sourcing Plan to achieve targeted business outcomes
- Build and manage cross-organization relationships with internal and external stakeholders
- Manage Category Teams and the Project and Open Market Sourcing Team to meet annual Strategic Sourcing goals and objectives
- Provide sign-offs on major Strategic Sourcing work products (e.g., category sourcing strategies, negotiation strategies, and award recommendations)
- Monitor relevant procurement metrics for all centrally managed categories and address below target performance
- Champion continuous improvement efforts within the Strategic Sourcing group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Financial Modeling
- Internal Stakeholder Collaboration
- Leadership
- Oral & Written Communications
- Project Management
- Sourcing Strategy Formulation & Implementation
- Strategic Planning
- Supplier Relationship Management (SRM) & Development

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience leading public or private sector strategic sourcing operation comparable to the complexity of the State of North Carolina

-Category Manager-

Job Description

The Category Manager reports directly to the Strategic Sourcing Director and serves as the main point-of-contact for all management-level issues regarding their assigned category. This position is responsible for the development and execution of the category sourcing plan that delivers the targeted business outcomes. Success in this position involves a deep understanding of Strategic Sourcing, Contract Management and Administration, and the ability to interact with key stakeholders.

Key Responsibilities

- Develop and maintain a Sourcing Plan for their category that delivers the right state term contracts to users across the state that effectively leverage the State’s buying power to drive down total costs for goods and / or services
- Ensure state term contracts within the category are effectively managed to continue to deliver value and meet business needs
- Manage one or more of the more complex state term contracts within the category
- Manage strategic supplier relationships to drive innovation and continuous improvements
- Manage Category Team resources
- Identify and investigate continuous improvement opportunities within the Strategic Sourcing group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Business Process Design & Continuous Improvement
- Contract Management & Administration
- Data Analysis
- Fact-Based Negotiation
- Industry & Marketplace Understanding
- Internal Stakeholder Collaboration
- Oral & Written Communications
- Project Management
- Sourcing Strategy Formulation & Implementation
- Strategic Planning
- Supplier Relationship Management & Development
- Total Cost Of Ownership (TCO) Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience in leading the development and successful execution of a category level sourcing plan, including the management of multiple supplier contracts

-Category Analyst II-

Job Description

The Category Analyst II reports directly to the Category Manager and serves as the main point-of-contact for all day-to-day issues regarding their assigned sub-category and contracts. The role requires the ability to build and manage cross functional teams to effectively establish state term contracts in line with the category sourcing plan. Success in this position involves using an integrated, proactive approach to develop and manage state term contracts for the right set of goods and services with participation from appropriate internal and external stakeholders.

Key Responsibilities

- Form and manage cross functional teams to conduct strategic sourcing of high-value, complex sub-categories to deliver state term contracts that meet the business needs of users at a lower total cost
- Administer and manage high-value, complex state term contracts, including monitoring suppliers’ performance and adherence to service level agreements during the life of the contract
- Analyze use of state term contracts and work with suppliers and Stakeholder Engagement & Communications Team to expand visibility and usage across eligible government and educational entities
- Identify and investigate continuous improvement opportunities within the Strategic Sourcing group and throughout the Procurement function

Key Skills

- Business Process Design & Continuous Improvement
- Contract Administration & Management
- Data Analysis
- Fact-Based Negotiations
- Industry & Marketplace Understanding
- Internal Stakeholder Collaboration
- Oral & Written Communications
- Product & Category Knowledge
- Project Management
- Sourcing Strategy Formulation & Implementation
- Supplier Relationship Management (SRM) & Development
- Total Cost of Ownership (TCO) Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience sourcing and managing state term contracts, or equivalents

-Category Analyst I-

Job Description

The Category Analyst I reports directly to the Category Manager and serves as the main point-of-contact for all day-to-day issues regarding their assigned sub-category and contracts. The role requires the ability to serve as a key resource to cross functional teams to effectively support the establishment of state term contracts in line with the category sourcing plan. The role also serves as a support resource for larger, more complex procurements managed by the category team. Success in this position involves using an integrated, proactive approach to develop and manage state term contracts for the right set of goods and services with participation from appropriate internal and external stakeholders.

Key Responsibilities

- Form and manage cross functional teams to conduct strategic sourcing of less complex sub-categories to deliver state term contracts that meet the business needs of users at a lower total cost
- Administer and manage less complex state term contracts, including monitoring suppliers’ performance and adherence to service level agreements during life of contract
- Analyze use of state term contracts and work with suppliers and Stakeholder Engagement & Communications Team to expand visibility and usage across eligible government and educational entities
- Provide support and input on large, complex procurements
- Identify and investigate continuous improvement opportunities within the Strategic Sourcing group and throughout the Procurement function

Key Skills

- Business Process Design & Continuous Improvement
- Contract Administration & Management
- Data Analysis
- Fact-Based Negotiations
- Industry & Marketplace Understanding
- Internal Stakeholder Collaboration
- Product & Category Knowledge
- Sourcing Strategy Formulation & Implementation
- Supplier Relationship Management (SRM) & Development
- Total Cost of Ownership (TCO) Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Sourcing Manager-

Job Description

The Sourcing Manager reports directly to the Strategic Sourcing Director and is responsible for the Project and Open Market Sourcing team. The role is responsible for ensuring incoming requisitions to State Procurement are assessed, assigned, and addressed by the appropriate team members based upon the complexity and value of the requisition. Success in this position involves managing a team of resources to identify and execute the right sourcing strategy to meet the business need.

Key Responsibilities

- Monitor the workload and staffing requirements of the Project and Open Market Sourcing Team based on stakeholder needs
- Coordinate effective communication and turnaround times with stakeholders
- Identify high-value, complex agency specific goods, services, or projects that are above their delegation of authority that would benefit from strategic sourcing process support and category experience from State Procurement
- Proactively identify high spend, one time purchases for early involvement from the Project and Open Market Sourcing Team
- Form and manage cross functional teams to conduct strategic sourcing of high-value, complex goods, services, or projects to deliver entity specific contracts that meet the business needs of users at a lower total cost
- Manage the execution of the appropriate sourcing strategy for open market requisitions
- Manage Project and Open Market Sourcing Team resources
- Identify and investigate continuous improvement opportunities within the Strategic Sourcing group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Business Process Design & Continuous Improvement
- Fact-Based Negotiation
- Internal Stakeholder Collaboration
- Oral & Written Communications
- Project Management
- Sourcing Strategy Formulation & Implementation

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience in leading multiple teams concurrently to conduct strategic sourcing process to deliver contracts that meet the business needs of users at a lower total cost

-Sourcing Analyst II-

Job Description

The Sourcing Analyst II reports directly to the Sourcing Manager and is responsible for developing and managing cross functional teams to execute agency-specific strategic sourcing projects. Success in this position involves a deep expertise in Strategic Sourcing as well as the ability to conduct complex sourcing projects and manage cross-functional teams.

Key Responsibilities

- Form and manage cross functional teams to conduct strategic sourcing of high-value, complex goods, services, or projects to deliver agency specific contracts that meet the business needs of users at a lower total cost
- Transition the administration of awarded contracts to the requesting entity’s Procurement group
- Identify and investigate continuous improvement opportunities within the Strategic Sourcing group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Data Analysis
- Fact-Based Negotiation
- Industry & Marketplace Understanding
- Oral & Written Communications
- Product & Category Knowledge
- Project Management
- Sourcing Strategy Formulation & Implementation
- Total Cost of Ownership (TCO) Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience in leading cross-functional teams to conduct strategic sourcing process for high-value, complex goods, services, or projects that delivered contract(s) that met the business needs of users at a lower total cost

-Sourcing Analyst I-

Job Description

The Sourcing Analyst I reports directly to the Sourcing Manager and is responsible for developing and managing cross functional teams to execute agency-specific open market requisitions. Success in this position involves using an integrated, proactive approach to conduct strategic sourcing of open market requisitions, the ability to process a high volume of transactions, and manage multiple sourcing projects at once.

Key Responsibilities

- Determine and execute the appropriate procurement approach for assigned open market requisitions submitted by the entities (e.g., spot buy, strategic sourcing)
- Turn over the administration of awarded contracts or purchase orders to the requesting entity’s Procurement group
- Identify and investigate continuous improvement opportunities within the Strategic Sourcing group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Procurement Applications
- Procurement Transaction Management & Processing
- Sourcing Strategy Formulation & Implementation

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience processing requisitions in E-Procurement to determine and execute the appropriate sourcing strategy to meet the business need

-Procurement Operations Director-

Job Description

The Procurement Operations Director reports directly to the State Chief Procurement Officer and manages the activities of the Training & Compliance team, the Procurement Support team, and the Stakeholder Engagement & Communications team.. The Procurement Operations Director oversees operations-related activities for State Procurement and the overall Procurement function, including supporting procurement training, conducting compliance reviews, generating reports, supporting Procurement related technology, providing administrative support, and engaging / communicating with internal and external stakeholders. Success in this position involves a deep understanding of the Procurement function and the ability to influence key stakeholders and manage multiple teams to meet the needs of their customers.

Key Responsibilities

- Lead group of teams that develop and execute procurement training, conduct compliance reviews of state agencies and community colleges, manage procurement related reporting, support Procurement technology, provide administrative support to State Procurement, and engage and communicate with internal and external stakeholders
- Manage Training & Compliance Manager, Procurement Support Manager, and Stakeholder Engagement & Communications Manager
- Champion continuous improvement efforts within the Operations group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Business Process Design & Continuous Improvement
- Contract Administration & Management
- Internal Stakeholder Collaboration
- Leadership
- Oral & Written Communications
- Project Management (including Enterprise Operations Management)
- Strategic Planning

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Work Experience
- Experience in leading multiple teams to support the operations of a procurement organization with similar complexity

-Training & Compliance Manager-

Job Description

The Training & Compliance Manager reports directly to the Procurement Operations Director and is responsible for managing the compliance management and training strategy to support the Procurement function. This role develops and maintains a training curricula for each Procurement position to ensure that the needs of the Procurement function are met. This position also oversees the compliance review activities of the team and ensures that training opportunities are provided to address the Compliance Review findings. The Training & Compliance Manager works directly with appropriate members of the Procurement organization to develop and maintain a comprehensive and understandable Purchasing Manual. Success in this position involves a deep understanding of the Procurement function and the ability to translate Compliance Review findings to develop an actionable training strategy.

Key Responsibilities

- Develop and maintain comprehensive training curricula for each procurement job profile that includes mandatory requirements
- Establish and manage Compliance Review schedule and communication of results to appropriate stakeholders
- Conduct analysis of Compliance Review findings to determine appropriate adjustments to training and procedures
- Develop and maintain Purchasing Manual for use by all state agencies and community colleges
- Manage Training & Compliance Team resources
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Business Process Design & Continuous Improvement
- Competency Model Development & Management
- Internal Stakeholder Collaboration
- Oral & Written Communications
- Training Development & Management

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Deep understanding of the Procurement function
- Experience developing and maintaining a comprehensive training curricula for an entire business function

-Compliance Specialist-

Job Description

The Compliance Specialist reports directly to the Training & Compliance Manager and is responsible for executing compliance reviews as directed by the compliance management strategy to support the Procurement function. This role works directly with appropriate members of the Procurement organization to schedule and conduct compliance reviews of state agencies, community colleges, or other entities as appropriate. Success in this position involves a deep understanding of the Procurement function, procurement laws, policies, and statutes, as well as the ability to conduct informal training sessions as needed to address compliance review findings.

Key Responsibilities

- Conduct compliance reviews to assess adherence to procurement statutes, administrative codes, executive orders, and Purchasing Manual
- Provide references to available training materials for informal training for entities to address major findings in compliance reviews
- Support maintaining the Purchasing Manual
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Data Analysis
- Internal Stakeholder Collaboration
- Oral & Written Communications
- Procurement Applications
- Procurement Law, Policy, and Process Understanding
- Procurement Transaction Management & Processing

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Training Coordinator-

Job Description

The Training Coordinator reports directly to the Training & Compliance Manager and is responsible for providing training either by developing and delivering leading edge training courses or enlisting third party training resources. This role works directly with appropriate members of the Procurement organization to schedule and conduct training courses. The Training Coordinator also works closely with the Stakeholder Engagement & Communications Specialist to develop surveys regarding training effectiveness. Success in this position involves a deep understanding of the Procurement function and the ability to develop and administer training content.

Key Responsibilities

- Develop and deliver in-house training courses as needed and/or supervise third party training development/delivery
- Schedule, support registration process, and conduct on-site training for procurement organizations
- Manage training records for centrally provided procurement training
- Provide feedback input for curricula updates to Training & Compliance Manager
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Competency Model Development & Management
- Contract Management & Administration
- Internal Stakeholder Collaboration
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications
- Procurement Law, Policy, and Process Understanding
- Training Development & Management

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Deep understanding of the Procurement function

-Procurement Support Manager-

Job Description

The Procurement Support Manager reports directly to the Procurement Operations Director and is responsible for managing activities of the support team, which includes managing the E-Procurement application third party support provider, supporting non E-Procurement technology, providing administrative support, and generating reports for the Procurement function. Success in this position involves a deep understanding of the Procurement function, business performance measure development/management, and internal stakeholder management.

Key Responsibilities

- Manage the E-Procurement application third party support contract
- Ensure support of the non E-Procurement technology used by State Procurement, administrative support for State Procurement leadership team, and development and distribution of standard Procurement function reports identified by State Procurement
- Manage Procurement Support Team resources
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Contract Management & Administration
- Internal Stakeholder Collaboration
- Project Management (including Enterprise Operations Management)

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Technology Support -

Job Description

The Technology Support role reports directly to the Procurement Support Manager and is responsible for providing support to the Procurement function for non-E-Procurement technologies. Success in this position requires a deep expertise in applicable technologies and the ability to provide technical guidance to non-technical stakeholders.

Key Responsibilities

- Provide support for non-E-Procurement technologies (e.g., IPS, VendorLink)
- Provide support regarding less complex eSourcing and reverse auction events (when available)
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Microsoft Applications: Excel, PowerPoint, Word
- Procurement Applications
- Procurement Transaction Management & Processing

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Technical knowledge of Procurement Applications

-Administrative Assistant-

Job Description

The Administrative Assistant reports directly to the Procurement Support Manager and is responsible for providing administrative support to State Procurement executives. The position performs routine secretarial and general office duties to support operational objectives. Responsibilities include typing, word processing, proofreading, handling phone calls, maintaining and organizing files, copying, reviewing and distributing mail, greeting visitors, ordering supplies, scheduling calendars, and making travel arrangements. Success in this position involves excellent attention to detail, expertise in multi-tasking, and the ability to think and act proactively to meet the needs of management.

Key Responsibilities

- Perform routine secretarial and general office duties for the Chief Procurement Officer, Strategic Sourcing Director, Procurement Operations Director, Supplier Diversity Director, and Procurement Legal Counsel
- Provide coverage for State Procurement’s main phone number and email box
- Support the Strategic Sourcing Teams with administration duties such as posting bids on IPS, loading contract documents on website, etc.
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications

Salary Grade

TBD

Minimum Education & Experience Levels

- Associates Degree or Equivalent Experience

-Reporting Specialist-

Job Description

The Reporting Specialist reports directly to the Procurement Support Manager and is responsible for performance data management within the Procurement function. The position develops standardized data analytics processes and creates standardized reporting templates to be utilized by the Procurement function. The Reporting Specialist also supports ad hoc reporting requests from State Procurement management. Success in this position involves a deep understanding of the Procurement function, business performance measure development/management, internal stakeholder management, and the ability to conduct metric trend analysis and translate data into meaningful insights.

Key Responsibilities

- Support the identification and ongoing accurate reporting of performance measures across the Procurement function
- Support trend analysis to provide insights into the Procurement function’s performance against established targets
- Support ad hoc reporting requests from State Procurement management
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Business Performance Measurement
- Data Analysis
- Financial Modeling
- Microsoft Applications: Access, Excel, PowerPoint, Word
- Procurement Applications

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Supplier Diversity Director-

Job Description

The Supplier Diversity Director reports to the State Chief Procurement Officer and is responsible for enabling the diverse supply base for consideration during solicitations. The position works with the Strategic Sourcing Director to develop a supplier diversity strategy that is aligned with the Sourcing Plan and proactively seek additional, qualified diverse suppliers. The Supplier Diversity Director also works with the Training & Compliance Manager to develop supplier diversity-related policies, procedures, and processes for inclusion in the Purchasing Manual. Success in this position requires a deep understanding of Procurement, strong supplier relationship management skills, and the ability to work with cross-functional teams.

Key Responsibilities

- Develop and execute strategies that promote the certification and active participation and growth of HUB suppliers and NC Preference suppliers in the procurement process
- Ensure a consistent and efficient certification process for HUB suppliers
- Support the Category Teams and the Project and Open Market Sourcing Team to maximize HUB supplier and NC Preference supplier participation
- Educate stakeholders on the benefits and opportunities associated with HUB suppliers and NC Preference suppliers
- Conduct HUB supplier and NC Preference supplier outreach activities, in close coordination with the Stakeholder Engagement & Communications Team
- Support development and delivery of supplier diversity training,
- Ensure appropriate supplier diversity data and processes are available to support supplier diversity related data analysis and reporting
- Manage relationships with HUB suppliers
- Manage Supplier Diversity Team resources
- Champion continuous improvement efforts within the Supplier Diversity Team and throughout the Procurement function

Key Skills

- Internal Stakeholder Collaboration
- Leadership
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications
- Strategic Planning
- Supplier Relationship Management (SRM) & Development

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Certification Specialist-

Job Description

The Certification Specialist reports directly to the Supplier Diversity Director and is responsible for the certification and maintenance of records for all diverse suppliers. The position maintains a centralized repository to track all diverse suppliers and their certifications. Success in this position requires a deep understanding of Supplier Relationship Management and the ability to translate Procurement policy requirements for suppliers.

Key Responsibilities

- Execute HUB supplier certification/recertification process
- Provide support to HUB suppliers on how to do business with the State
- Identify and investigate continuous improvement opportunities within the Supplier Diversity Team and throughout the Procurement function

Key Skills

- Oral & Written Communications
- Supplier Relationship Management (SRM) & Development

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Stakeholder Engagement & Communications Specialist (Supplier Diversity) -

Job Description

The Stakeholder Engagement & Communications Specialist reports directly to the Supplier Diversity Director and is responsible for supporting the logistical coordination of outreach activities (e.g., conducting outreach meetings, supporting bidders meetings) and communications to targeted supplier groups. The position develops, uploads, and maintains website content relevant to the diverse supply base. The Specialist also helps develop internal and external surveys specifically regarding diverse suppliers. Success in this position requires strong oral and written skills and the ability to provide excellent support to diverse suppliers.

Key Responsibilities

- Support the execution of the approved Procurement Communications Plan to eligible diverse suppliers and stakeholders
- Provide timely customer service and support in response to incoming calls, emails, etc.
- Maintain State Procurement’s website content for diverse suppliers
- Support the development of internal and external surveys related to supplier diversity
- Coordinate communications and outreach with the Stakeholder Engagement & Communications Team
- Identify and investigate continuous improvement opportunities within the Supplier Diversity Team and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Internal Stakeholder Collaboration
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Stakeholder Engagement & Communications Manager -

Job Description

The Stakeholder Engagement & Communications Manager reports directly to the Procurement Operations Director and is responsible for developing and executing the Procurement Communications Plan. This role is also responsible for managing communication activities and outreach events to internal and external stakeholders on behalf of the Procurement function. The position also develops and maintains appropriate communications to promote the value delivered by the Procurement function. Success in this position requires a deep understanding of communications and stakeholder management.

Key Responsibilities

- Manage Procurement function’s internal and external communications to stakeholders
- Develop and manage execution of Procurement Communication Plan to increase eligible users’ awareness and use of state term contracts
- Promote Procurement function’s successes and continuous improvement initiatives
- Ensure maintenance of content on State Procurement’s website
- Coordinate communications and outreach activities with the Supplier Diversity Team
- Manage Stakeholder Engagement & Communications Team resources
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Internal Stakeholder Collaboration
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience in developing and executing a comprehensive Communications Plan with a diverse set of stakeholders

-Stakeholder Engagement & Communications Specialist -

Job Description

The Stakeholder Engagement & Communications Specialist reports directly to the Stakeholder Engagement & Communications Manager and is responsible for supporting the logistical coordination of outreach activities (e.g., conducting outreach meetings, proactively calling entity procurement leadership) and communications. The position develops, uploads, and maintains a website for end users to obtain procurement related information. The Specialist also helps develop internal and external surveys. This role is responsible for outreach and engagement of targeted stakeholders, providing them with the information and support they need to efficiently and effectively achieve their targeted procurement related business outcomes. Success in this position requires strong communications skills and the ability to provide excellent support to targeted stakeholders.

Key Responsibilities

- Manage the outreach and engagement with targeted stakeholders to build strong working relationships
- Provide timely customer service and support in response to incoming calls, emails, etc.
- Support the execution of the approved Procurement Communications Plan to targeted stakeholders
- Maintain State Procurement’s website content for internal and external stakeholders
- Support the development of internal and external surveys
- Coordinate communications and outreach with Supplier Diversity Team
- Identify and investigate continuous improvement opportunities within the Operations group and throughout the Procurement function

Key Skills

- Ability to Adapt to Change
- Internal Stakeholder Collaboration
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Procurement Legal Counsel-

Job Description

The Procurement Legal Counsel reports directly to the State Chief Procurement Officer and is responsible for providing legal expertise for the Procurement function. The position provides reviews of complex solicitations and contracts for adherence to North Carolina statutes, administrative codes, and policies. The position also leads the team responsible for statute interpretations for the Procurement function. The Procurement Legal Counsel confers with the Attorney General Office where required or needed. Success in this position requires a deep understanding of the Procurement function and the ability to translate complex, legal terminology for non-legal stakeholders.

Key Responsibilities

- Review solicitations and contracts to ensure adherence to North Carolina laws and Procurement policies, conferring with the Attorney General and DOA Legal Counsel as needed/required
- Manage legal reviews and provide procurement-related legal support services for the Procurement function upon request
- Provide statute interpretation services for the Procurement function, conferring with the Attorney General and DOA Legal Counsel as needed
- Support State Procurement teams upon request, conferring with the Attorney General and DOA Legal Counsel as needed
- Manage the supplier protest response process for the State Procurement managed solicitations
- Manage the Legal Team resources

Key Skills

- Ability to Adapt to Change
- Internal Stakeholder Collaboration
- Oral & Written Communications
- Procurement Law, Policy, and Process Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Law Degree
- North Carolina Bar Association Certified

-Paralegal-

Job Description

The Paralegal reports directly to the Procurement Legal Counsel and supports the development of a standard set of terms and conditions for Procurement contracts. The position provides reviews of complex solicitations and contracts for adherence to North Carolina policies and statutes. The Paralegal also supports the interpretation of statutes for the Procurement function. This position plays an important role in making sure contract documents and solicitations are following the prescribed template. Success in this position requires a deep understanding of the Procurement function and the ability to translate complex, legal terminology for non-legal stakeholders.

Key Responsibilities

- Develop and maintain a single set of legal terms and conditions
- Support the development and delivery of appropriate training on proper use of prescribed solicitation and contract templates
- Monitor and enforce consistent and proper use of prescribed contract templates and terms and conditions in solicitations and contract documents
- Conduct contract reviews for adherence to North Carolina laws and Procurement policies and engage in defined process for reviewing exceptions
- Support providing statute interpretation services for the Procurement function

Key Skills

- Oral & Written Communications
- Procurement Law, Policy, and Process Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Associates Degree or Equivalent Experience

Recommended Job Profiles State Agencies and Community Colleges

-Procurement Director-

Job Description

The Procurement Director works with key stakeholders to champion the Procurement function’s overall strategy, vision, mission, and guiding principles. Key responsibilities include development and execution of the procurement related components of the entity’s overall Strategic Plan, management of the entity’s procurement Sourcing Plan, and ensuring compliance to procurement statutes, administrative codes, and the Purchasing Manual. This position is also responsible for overseeing critical activities with strategic suppliers (e.g., contract negotiations). The Procurement Director must also develop and maintain cross-divisional relationships, be the main point of contact with State Procurement, drive continuous improvements, and deliver quality customer service. Success in this position requires strong stewardship in spending the entity’s budget appropriately, the ability to manage relationships with internal and external stakeholders to communicate and obtain support of the value delivered by Procurement.

Key Responsibilities

- Champion the Procurement function’s vision, mission, and guiding principles with stakeholders to achieve targeted business outcomes
- Manage relationships with internal and external stakeholders to communicate and obtain support of the value delivered by Procurement
- Build cross-divisional relationships that drive continuous improvements and focus on customer service
- Responsible for procurement operations within their entity (e.g., Strategic Plan, Sourcing Plan) and compliance to procurement statutes, administrative codes, and Purchasing Manual
- Provide procurement related support for end-users across the Procurement function
- Develop and maintain strong relationship with State Procurement, collaborating to identify procurements that are better handled by State Procurement to drive more savings across multiple entities
- Provide support and input to the Procurement Governance Team (defined in Governance Model Deliverable) and the State Procurement Category teams
- Champion continuous improvement efforts within the Procurement function

Key Skills

- Ability to Drive and Adapt to Change
- Internal Stakeholder Collaboration
- Leadership
- Oral & Written Communications
- Sourcing Strategy Formulation & Implementation
- Strategic Planning
- Supplier Relationship Management (SRM) & Development

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience
- Experience managing relationships with internal and external stakeholders to achieve targeted business outcomes

-Procurement Officer-

Job Description

The Procurement Officer reports to the Procurement Director in large sized entities, that have a need for additional management positions. Within medium sized entities that do not support having a Procurement Director, the Procurement Officer is fully responsible for procurement activities and works with key stakeholders to champion the Procurement function’s overall strategy, vision, mission, and guiding principles. Key responsibilities include development and execution of the procurement related components of the entity’s overall Strategic Plan, management of the entity’s procurement Sourcing Plan, and ensuring compliance to procurement statutes, administrative codes, and the Purchasing Manual. The Procurement Officer must also be able to build and develop cross-divisional relationships, drive continuous improvements, and deliver quality customer service. Success in this position requires strong stewardship in spending the entity’s budget appropriately, the ability to manage relationships with internal and external stakeholders to communicate and obtain support of the value delivered by Procurement.

Key Responsibilities

- Champion the Procurement function’s vision, mission, and guiding principles with stakeholders to achieve targeted business outcomes
- Manage relationships with internal and external stakeholders to communicate and obtain support of the value delivered by Procurement
- Build cross-divisional relationships that drive continuous improvements and focus on customer service
- Responsible for procurement operations within their entity (e.g., Strategic Plan, Sourcing Plan) and compliance to procurement statutes, administrative codes, and Purchasing Manual
- Provide procurement-related support for end-users across the Procurement function
- Develop and maintain strong relationship with State Procurement, collaborating to identify procurements that are better handled by State Procurement to drive more savings across multiple entities
- Provide support and input to the Procurement Governance Team (defined in Governance Model Deliverable) and the State Procurement Category teams
- Champion continuous improvement efforts within the Procurement function

Key Skills

- Ability to Drive and Adapt to Change
- Internal Stakeholder Collaboration
- Leadership
- Oral & Written Communications
- Sourcing Strategy Formulation & Implementation
- Strategic Planning
- Supplier Relationship Management (SRM) & Development

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

Recommended Job Profiles State Agencies and Community Colleges

-Procurement Specialist III-

Job Description

The Procurement Specialist III reports directly to the Procurement Director/Officer and is responsible for leading the execution of strategic sourcing for high-value, complex requisitions. This position is also responsible for supporting the development and execution of the entity level Sourcing Plan, supporting end-users during the requisition process, and negotiating/executing entity specific contracts with suppliers. Success in this position requires a deep understanding of Strategic Sourcing, contract negotiations and the ability to work with cross-functional teams.

Key Responsibilities

- Lead the execution of the strategic sourcing methodology for high-value, complex requisitions, collaborating with State Procurement and end-users as required / appropriate
- Support development and execution of the entity level Sourcing Plan
- Review requisitions above the formal bid threshold and determine appropriate supply source in adherence to procurement-related statutes, administrative codes, and Purchasing Manual
- Support end-users during the requisition process
- Create solicitation and contract documents in adherence to the statewide templates
- Conduct solicitations and execute entity specific contracts or purchase orders with suppliers
- Identify and investigate continuous improvement opportunities within the Procurement function

Key Skills

- Data Analysis
- Fact-Based Negotiations
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications
- Procurement Applications
- Procurement Transaction Management & Processing
- Sourcing Strategy Formulation & Implementation
- Supplier Relationship Management (SRM) & Development
- Total Cost of Ownership (TCO) Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Procurement Specialist II-

Job Description

The Procurement Specialist II reports directly to the Procurement Director/Officer and is responsible for leading the execution of the strategic sourcing for less complex requisitions. This position is also responsible for supporting end-users during the requisition process and negotiating/executing entity specific contracts with suppliers. Success in this position requires a deep understanding of Strategic Sourcing, contract negotiations and the ability to work with cross-functional teams.

Key Responsibilities

- Lead the execution of the strategic sourcing methodology for less complex requisitions above the formal bid threshold, collaborating with State Procurement and end-users as required / appropriate
- Support end-users during the requisition process
- Create solicitation and contract documents in adherence to the statewide templates
- Conduct solicitations and execute entity specific contracts or purchase orders with suppliers
- Identify and investigate continuous improvement opportunities within the Procurement function

Key Skills

- Data Analysis
- Fact-Based Negotiations
- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications
- Procurement Transaction Management & Processing
- Sourcing Strategy Formulation & Implementation
- Total Cost of Ownership (TCO) Understanding

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

**Recommended Job Profiles
 State Agencies and Community Colleges**

-Procurement Specialist I-

Job Description

The Procurement Specialist I reports directly to the Procurement Director/Officer and is responsible for reviewing requisitions below the formal bid threshold and determining appropriate supply source(s). This position is also responsible for supporting end-users during the requisition process. Success in this position requires an understanding of procurement-related statutes, administrative codes, and the Purchasing Manual.

Key Responsibilities

- Review requisitions below the formal bid threshold and determine appropriate supply source in adherence to procurement-related statutes, administrative codes, and Purchasing Manual
- Support end-users during the requisition process
- Execute entity specific purchase orders with suppliers
- Identify and investigate continuous improvement opportunities within the Procurement function

Key Skills

- Microsoft Applications: Excel, PowerPoint, Word
- Oral & Written Communications
- Procurement Transaction Management & Processing

Salary Grade

TBD

Minimum Education & Experience Levels

- Associates Degree or Equivalent Experience

Recommended Job Profiles State Agencies and Community Colleges

-Contract Specialist-

Job Description

The Contract Specialist reports directly to the Procurement Director/Officer and is responsible for performing all contract administration activities for high-value, complex entity-specific contracts not managed by State Procurement. This position is also responsible for monitoring supplier performance and adherence to service level agreements during the life of contracts. The Contract Specialist provides contract support regarding terms and conditions for entity-specific contracts. Success in this position requires a deep understanding of Contract Administration and Management, the ability to work with cross-functional teams, and the ability to translate contract terminology for stakeholders.

Key Responsibilities

- Perform contract administration activities for high-value, complex entity-specific contracts, including monitoring suppliers’ performance and adherence to service level agreements during life of contract
- Support divisional / program areas with contract terms and conditions related issues with entity-specific contracts
- Identify and investigate continuous improvement opportunities within the Procurement function

Key Skills

- Contract Management & Administration
- Oral & Written Communications
- Supplier Relationship Management (SRM) & Development

Salary Grade

TBD

Minimum Education & Experience Levels

- Bachelors Degree or Equivalent Experience

-Contract Technician

Job Description

The Contract Technician reports directly to the Procurement Director/Officer and is responsible for performing all contract administration activities for less complex entity-specific contracts. This position is also responsible for monitoring supplier performance and adherence to service level agreements during the life of contracts. The Contract Technician provides contract support regarding terms and conditions for entity-specific contracts. Success in this position requires a deep understanding of Contract Administration and Management, the ability to work with cross-functional teams, and the ability to translate contract terminology for stakeholders.

Key Responsibilities

- Perform contract administration activities for less complex entity-specific contracts, including monitoring suppliers’ performance and adherence to service level agreements during life of contract
- Support divisional / program areas with contract terms and conditions related issues with entity-specific contracts
- Identify and investigate continuous improvement opportunities within the Procurement function

Key Skills

- Contract Management & Administration
- Oral & Written Communications

Salary Grade

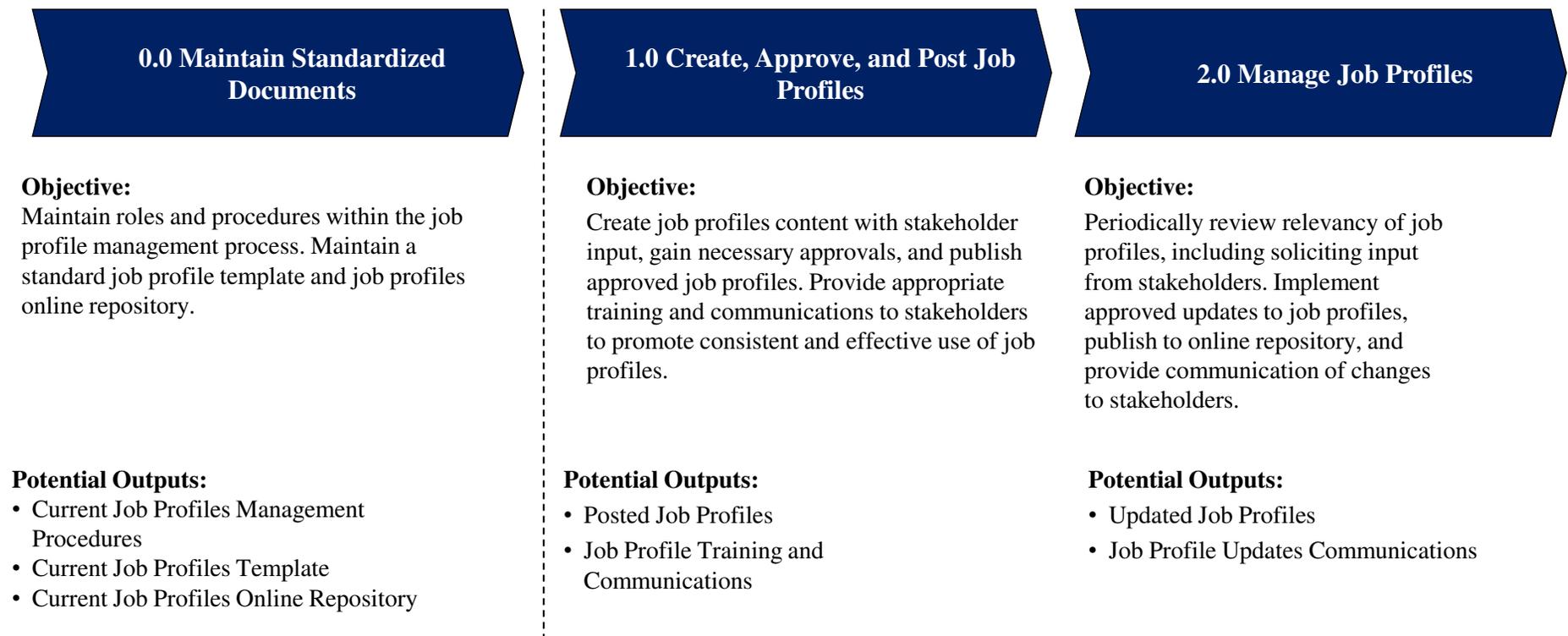
TBD

Minimum Education & Experience Levels

- Associates Degree or Equivalent Experience

A centrally managed process is recommended to maintain the Procurement job profiles to ensure their ongoing relevancy.

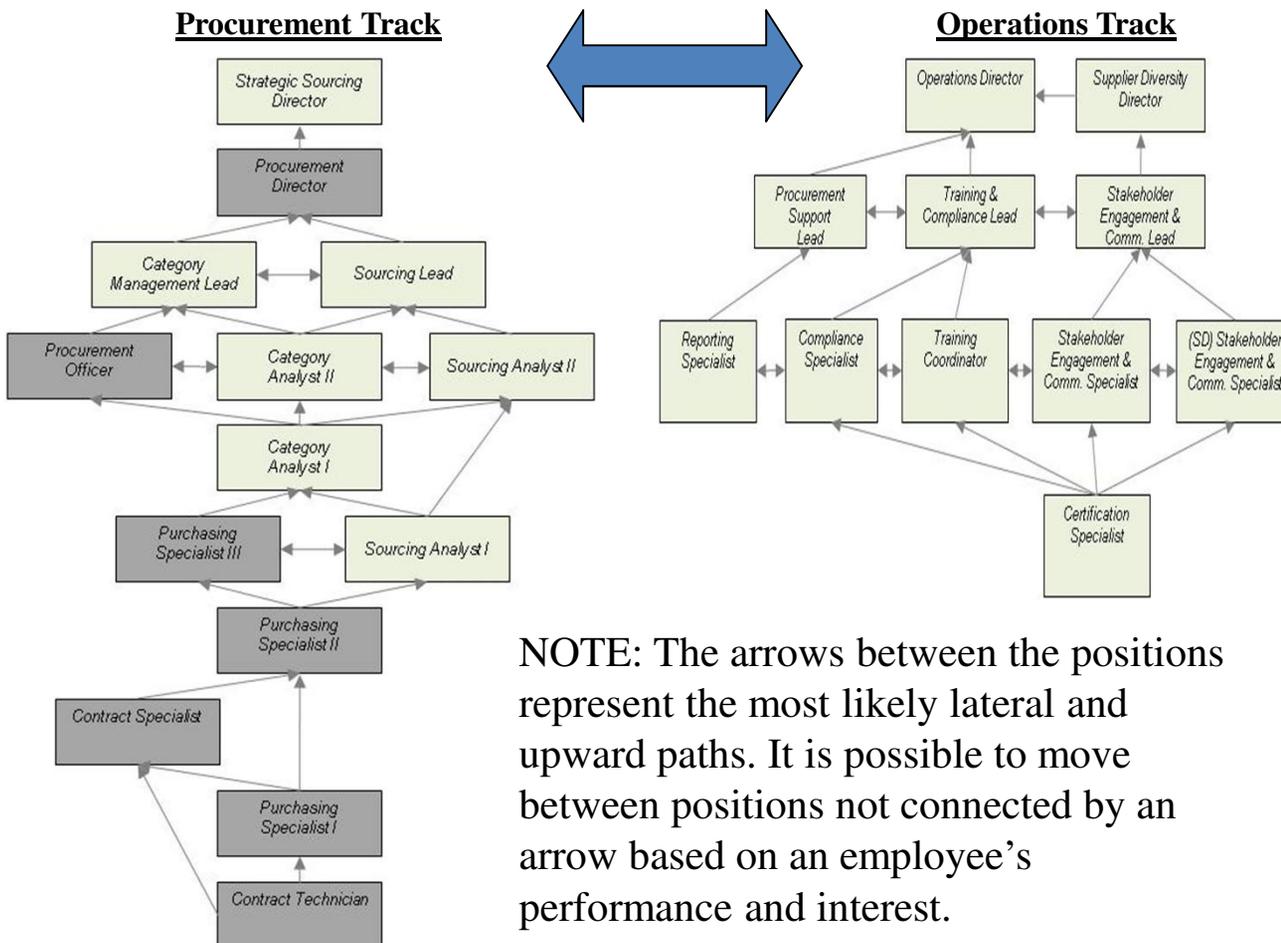
Key Objective: Provide a standardized, centrally managed process to maintain consistency and relevancy of Procurement job profiles



The Office of State Personnel (OSP) has the ultimate accountability in managing this process, which includes providing opportunities for stakeholders to provide input of potential changes.

Key Activities	Description	Role								
		OSP	Procurement Governance Team	State Procurement	State Agency Procurement	Community College Procurement	University Procurement	LEA Procurement	Local Government Procurement	Entity Human Resources Department
0.0 Maintain Standardized Documents	<ul style="list-style-type: none"> Maintain Job Profile Template Maintain Job Profile Repository 	A,R	I	I	I	I	I	I	I	I
1.0 Create, Approve, and Post Job Profiles	<ul style="list-style-type: none"> Create Job Profile Content for Procurement Roles Develop Job Profile Training Explaining Linkage to Job Description Development Post Job Profiles Online and Communicate to Stakeholders 	A,R	I	R, C	C	C	I	I	I	I
2.0 Manage Job Profiles	Request Job Profile Updates from Stakeholders	A,R	I	I	I	I	-	-	-	I
	Provide Suggested Job Profile Updates (if any)	A	I	R	R	R	-	-	-	R
	Review and Provide Approval Decisions on Recommended Job Profile Updates	A,R	I	C	C	C	I	I	I	C
	Post Updated Job Profiles Online and Communicate to Stakeholders	A,R	I	I	I	I	I	I	I	I

With standardized job profiles, Procurement can establish career tracks to provide resources with better visibility to the opportunities for lateral and upward advancement.



NOTE: The arrows between the positions represent the most likely lateral and upward paths. It is possible to move between positions not connected by an arrow based on an employee's performance and interest.

Career Track Benefits

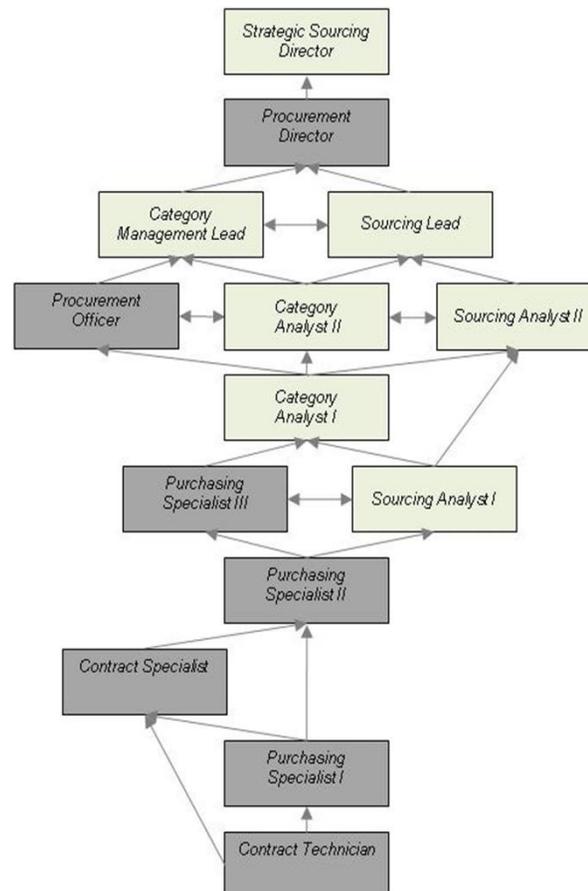
- Provides a clear framework for employees to customize and plan future career aspirations, including moving between tracks
- Enables supervisors to facilitate career planning discussions with direct reports
- Aids in development of training curricula to support advancement within the Procurement and Operations tracks

Career Track Key

-  State Procurement Position
-  State Agency and Community College Position

The Procurement track provides an opportunity to develop deep Procurement expertise through positions within State Procurement, state agencies, and community colleges.

Procurement Track



Career Track Key

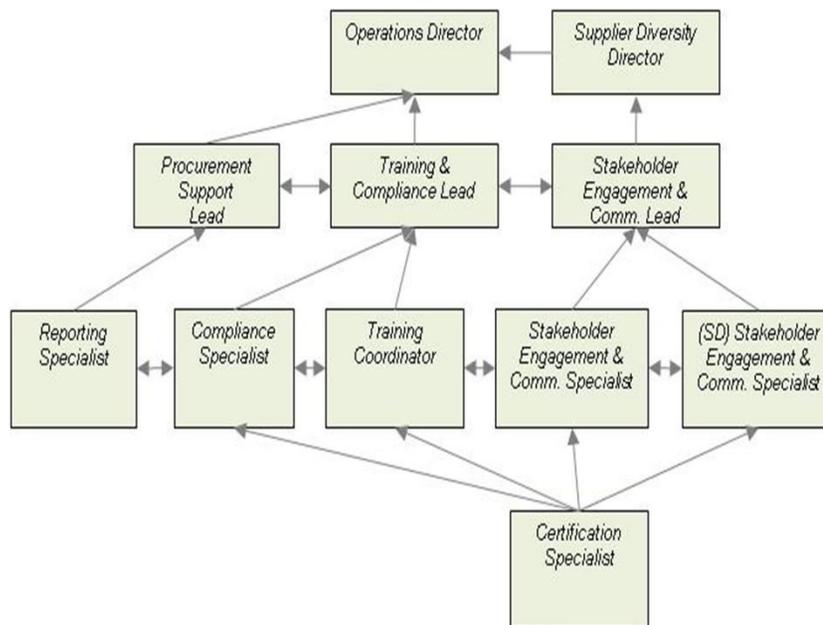
- State Procurement Position
- State Agency and Community College Position

Procurement Career Track Benefits

- Provides the opportunity to gain Procurement experience across the various Procurement organizations
- Provides upward mobility opportunities with increasing levels of responsibility
- Provides the opportunity to acquire in-depth sourcing and category management experience across a range of categories of goods and services
- Acknowledges importance of having both central procurement authority and entity procurement level experience

The Operations track provides an opportunity to acquire cross-functional experience through various positions within State Procurement.

Operations Track



Career Track Key

-  State Procurement Position
-  State Agency and Community College Position

Operation Career Track Benefits

- Provides an opportunity to gain exposure to all aspects of Procurement Operations
- Provides upward mobility opportunities with increasing levels of responsibility

Table of Contents

- Executive Summary
- Approach and Collection Process
- Recommended Organizational Structure
- Recommended Job Profiles
- Full-Time Equivalent Analysis
- Appendix

Full Time Equivalent Analysis

State agencies and community colleges reported 355 full time equivalents across 450 positions that play an active role in procuring goods and services and administering contracts.

Entity Segment	Managing Procurement FTEs	Conducting Informal Bids (<\$10,000) FTEs	Conducting Formal Bids (\$10,000+) FTEs	Administering Contracts FTEs	Supporting Procurement Operations FTEs	Providing Procurement Administrative Support FTEs	Other FTEs	Totals	
								FTEs	# of Positions
State Agencies	20	46	22	64	19	9	14	194	273
Community Colleges	37	14	8	2	13	11	6	90	106
Central Procurement Authorities	10		19	8	29	5		71	71
Totals	67	59	48	75	61	25	21	355	450
% of Total FTEs	19%	17%	14%	21%	17%	7%	6%		

Key Observations

- The 10 largest state agency / community college procurement organizations have 66% of the reported procurement FTEs, with DHHS alone accounting for 21% of the 355 total procurement FTEs
- Of the 75 state agencies and community colleges that responded to the information request, 47 (63%) have 2 or fewer reported positions performing procurement activities
- Of the 355 reported procurement FTEs, 20% are in the central procurement authorities (includes the HUB Office)
- More than 200 different titles were reported by state agencies and community colleges
- Over 6,130 p-cards are issued by state agencies and community colleges
- State agencies and community colleges reported using more than 50 different tools (in addition to E-Procurement), including MS Excel, Datatel Colleague, MS Word, MS Access, NCAS, and IPS to perform procurement related activities
- Per the E-Procurement system, 3,113 state agency and community college employees created one or more requisitions in FY09/10

This baseline data will support more detailed analysis during the Implementation Phase to identify potential changes needed to state agency and community college procurement organizations after the State Procurement organization is implemented.

Table of Contents

- Executive Summary
- Approach and Collection Process
- Recommended Organizational Structure
- Recommended Job Profiles
- Full-Time Equivalent Analysis
- Appendix
 - Procurement Vision and Guiding Principles
 - RACI Definition

Vision: *Create a customer-focused enterprise to achieve increased procurement effectiveness, efficiency, and compliance resulting in significant financial benefit for taxpayers by reducing the costs of acquiring goods and service.*

Guiding Principles

Best Value

Procure goods and services at the lowest total cost of ownership by leveraging the State's buying power using the most appropriate channels to deliver economic value for North Carolina taxpayers

Customer Focus

Address all stakeholders' business needs and manage their expectations in a timely, informative, and responsive manner

Delivery Excellence

Develop, maintain, and execute standardized, repeatable procurement processes and procedures across the Procurement function – supported by technology where appropriate – to achieve targeted business outcomes

Compliance and Accountability

Enforce compliance with statutes, administrative codes, executive orders, and policies while providing appropriate transparency for stakeholders through monitoring, measuring, and reporting activities

Operational Efficiency

Align people, processes, and technology to optimize the Procurement function against defined procurement goals and metrics

Workforce Excellence

Maintain a workforce with the right knowledge and skills to be viewed as a trusted partner on procurement related issues to achieve targeted business outcomes

Strategic Planning

Strategically plan procurement activities using a proactive and collaborative approach to optimize the return on investment for the State of North Carolina

The RACI matrix is a framework that is used to clearly define roles and responsibilities for a process.

<p>Responsible</p>	<ul style="list-style-type: none"> • The individual(s) who performs the task, responsible for the action/implementation • The degree of responsibility is defined by the Accountable person • “R’s” can be shared 	<p> The ‘Doer’</p>
<p>Accountable</p>	<ul style="list-style-type: none"> • The individual who is ultimately accountable • Has Yes/No power, as well as power of veto • Only one “A” can be assigned to a process step/activity 	<p> “The Buck stops here”</p>
<p>Consulted</p>	<ul style="list-style-type: none"> • The individual(s) to be consulted prior to an action being taken or a final decision made • Encourages two-way communication • “C’s” can be shared 	<p> “In the Loop”</p>
<p>Informed</p>	<ul style="list-style-type: none"> • The individual(s) who need to be informed after an action has been taken, or a decision is made • “I’s” can be shared 	<p> “FYI”</p>