

Job Description

Job Title:	Procurement Specialist, Complex Requests (RFX)
Department:	Procurement & Contract Services
Reports To:	Director, Procurement & Contract Services
Jobs Reporting:	None
Salary Grade:	USG 11
Effective Date:	July 2019

Primary Purpose

Interprets needs and provides expert advice on procurement plan, methodology, tools, processes and approach to acquisitions required by Academic Support Units, Faculty and cross-functional uWaterloo teams.

Leads/facilitates complex, strategic supplier selection to optimize cost, quality, lead-time, service, innovation, risk and value. Executes and monitors contracts for goods and services in compliance with University of Waterloo policies and processes and external legislative requirements in a publicly funded institutional environment.

Key Accountabilities

Planning and project management

- Manage strategic complex and/or politically sensitive acquisitions and related processes, including those in excess of \$1 million;
- Map out acquisition process to satisfy action milestones and goods/services delivery date(s) according to requirements;
- Identify opportunities for projects/ initiatives requiring broad consultation across campus;
- Manage adherence to the terms and conditions of agreements, and ensure that audit requirements are satisfied;
- Ensure accurate, consistent and efficient workflow to best support requestors.

Complex Competitive Procurement

- Provide strategic direction and leadership in the development of all stages of the sourcing project lifecycle (planning, pre-award, award, administration and monitoring, evaluation, reporting, vendor relationship management) for complex projects and strategic initiatives to achieve the proposed objectives and business value including, but not limited to, optimized cost, quality, lead-time, service, innovation, risk and value.
- Advise and recommend best practices for procurement processes for complex, large and high value acquisitions, in line with operational requirements and deadlines by providing expert advice on procurement plan, methodology, tools, processes and approach to acquisitions required by Academic Support Units, Faculty and cross-functional uWaterloo teams.
- Oversee and facilitate the preparation of various formal contractual documents such as: Request for Proposal (RFP), Request for Information (RFI), Request for Expression of Interest (REOI), Request

for Quotation (RFQ), Memorandum of Understanding (MOU) and Service Level Agreements (SLA) etc, collectively referred to as “RFX”.

- Negotiate RFX Terms and Conditions and/or Agreements with vendors, clients and various stakeholders often with competing and conflicting goals, objectives and priorities.
- Undertake market research and provides recommendations for making long-term acquisitions (e.g. multi-year contracts) including advice on strategy;
- Ensure implementation of strategies and tactics for the procurement of goods and services are legally compliant, effective and efficient.
- Provide leadership and support in decision-making and identifies opportunities for systemic RFX related change and new approaches.
- Develop and maintain necessary tools, templates, processes to support efficient sourcing in procurement and tracks performance of suppliers (KPI).
- Ensure data and privacy are protected throughout the procurement process with appropriate credentials, standards and testing, in consultation with specialists in other areas (e.g. IST; privacy)

Carry out responsibility to bind the University to contractual obligations

- Negotiate and execute (per Procedure 1) complex, high value/risk acquisitions’ contracts and agreements;
- Ensure research information and results are protected throughout the procurement process with appropriate intellectual property (IP) rights and/or Non-Disclosure clauses/agreements (NDAs);
- Ensure current legislative requirements are interpreted and met across a broad spectrum of University acquisitions (e.g. trade agreements; procurement case law; research ethics; safety regulations; AODA compliance);
- Protect the university from academic, reputational and financial risk through the compliant acquisition of goods and services and contract negotiations, balanced by the need to be flexible and responsive to faculty requirements while facilitating the research enterprise;
- Apply university policies and procedures as they relate to the acquisitions of goods and services (e.g. Policy 17), financial protocols (e.g. security on advance payments; year-end and accrual of expenses, capital asset purchases and disposals); facilities management; biohazards, etc.
- Ensure appropriate insurance coverages and values are in place to protect capital assets and supplier activities on campus;
- Understand and manage the appropriate retention of documentation that is required/may be released under Freedom of Information (FIPPA) requests.

Problem solving and risk management

- Recognize and manage conflict of interest situations to maintain ethical credibility;
- Debrief unsuccessful suppliers, and respond to and mitigate potential bid disputes;
- Ensure procurements are performed in a fair, consistent and transparent fashion;
- Investigate and remedy claims related to damages or deficiencies of goods or service delivery;
- Provide analysis of internal processes to Director and stakeholders to support strategic decision making (e.g. make recommendations for process improvements).

Leadership and teamwork abilities

- Provide administrative advice to faculty, departments, senior administrators and partners regarding best practices and process navigation, executing (amendments to) agreements, such as change orders, resolution of payment problems and disputes regarding contracts, correspondence with end users and suppliers to ensure effective performance monitoring of project deliverables;

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- Persuade and guide requestors through the procurement process and all associated, relevant contact points along the way;
- Clearly communicate and advise end users of the implications and obligations implied by contract terms, and suggest alternatives when concerns are raised during negotiations;
- Explain and manage the acquisitions and contracting process to stakeholders, ensuring that all participants clearly understand the objectives and their obligations;
- Develop relationships with suppliers to enable effective communication and facilitation when questions or concerns arise;
- Exhibit and model a highly ethical approach when engaging in University business opportunities;
- Mentoring of buying staff within the department.

Required Qualifications

Education

- Undergraduate diploma, with professional certification in a related field (e.g. CSCMP; CSCP), or an equivalent combination of education, certification and experience;
- Experience mentoring and providing advice and guidance.

Experience

- At least seven (7) years of professional procurement experience, at least one (1) of which is in a publicly funded environment;
- Experience with the Request for Proposals procurement process and project management
- Demonstrated experience drafting and editing proposals and agreements, and to negotiate terms and conditions.

Knowledge/Skills/Abilities

- Expert knowledge of requirements as set out in the Provincial Broader Public Sector (BPS) Procurement Directive; regulations and requirements as set out in the Canadian Free Trade Agreement (CFTA); the North American Free Trade Agreement (NAFTA) and its' successor; the Comprehensive Economic Trade Agreement (CETA) with the European Union, and similar governmental trade protocols;
- Demonstrated knowledge, understanding and experience in strategic sourcing and contracting practices/standards;
- Strategic communication competencies and analytical skills to assess/understand uWaterloo needs/requirements and develop innovative procurement strategies and options, factoring in potential risks;
- Demonstrated experience in contract development, administration and negotiations;
- Project management and organizational skills to plan, coordinate, and lead major procurement projects and articulate needs into procurement documentation;
- Excellent interpersonal skills in communication, relationship management, persuasion, exercising sound judgement, dealing with confidential information;
- Expert reasoning, problem solving, negotiation, mediation and dispute resolution skills;
- Proactive, critical thinker, evaluator and problem solver, creative with approaches, processes, and technology;
- Leadership and mentoring skills;
- Lean, innovation and quality improvement skills.

Nature and Scope

- **Contacts:** Interacts with various types of customers, peers and superiors throughout the University community. Particular involvement with faculty and senior administration throughout operational and large acquisitions. Involvement with the supplier community to facilitate knowledge and opportunities for acquisitions and partnerships, as well as external partners and agencies.
- **Level of Responsibility:** Responsible for proactively protecting the University from liability, reputational risk, and loss of research funding. Ability to influence, lead and mentor members of the campus community, and to integrate due diligence into acquisitions and their related processes.
- **Decision-Making Authority:** Knowledge and confidence to make and defend difficult decisions in a legally sensitive environment; responsibility for major acquisitions, including those in excess of \$1 million; signing authority under Procedure 1 of up to \$100,000.
- **Physical and Sensory Demands:** Minimal exposure to disagreeable conditions in the physical environment, typical of a professional working within an office or institutional environment; occasional travel required. Project activities are often in a fast-paced, timely and politically sensitive climate.
- **Working Environment:** Office based, with frequent visits to various work areas across campus, locally with partners (e.g. local cooperative purchasing group; supplier sites), and occasional travel; some work outside of the normal operating hours of the institution is required at peak periods, for special projects, or to maintain appropriate coverage in the department.