

TENDERING CLERK**NATURE OF WORK**

This is administrative and clerical work in the co-ordination of tendering and excise tax refund activities for the Financial and Administrative Services.

The employee of this class is responsible for planning and co-ordinating tendering activities to ensure that related regulations and procedures are followed and for the preparation of various tax rebate applications. Work involves reviewing purchase orders to determine tender requirements; preparing documents for tender exempt purchases; assisting in the preparation of tender specifications; co-ordinating tender openings; evaluating bids and advising department on preferred bid; determining tax rebates available and preparing rebate applications and maintaining related records. Work involves considerable contact with University officials as well as federal and provincial government representatives. Work is performed in accordance with established University policies and procedures with considerable independence and initiative under the direction of immediate supervisor. Work is reviewed through discussion, reports and observation of results obtained.

ILLUSTRATIVE EXAMPLES OF WORK

Plans and co-ordinates tendering activities for University purchases; ensures that appropriate regulations and procedures are followed; discusses unusual problems with immediate supervisor.

Reviews purchase orders for appropriate signatures and account funds; determines tender requirement in accordance with University policies and provincial government legislation; advises departmental representative of tender requirement.

Prepares appropriate documentation for tender exempt purchases; completes exemption form indicating the justification for exempt status; forwards documentation for appropriate signatures; maintains records of tender exempt purchases and prepares quarterly summary report.

Assists in the preparation of tender documents; ensures that tender specifications are complete and accurate; prepares standard advertisements for tender invitations; establishes the closing date and location of tender opening.

Co-ordinates tender openings; represents the Financial and Administrative Services at tender openings; ensures that established procedures are followed; prepares written summary of tender opening; advises immediate supervisor of unusual problems.

Evaluates tender bids using established procedures; determines the benefit and cost of each bid as well as the overall preferred bid; advises departmental officials of tender evaluation; discusses factors affecting bid acceptance; requests justification for recommendation of alternate bid.

Reviews purchase orders to determine applicable federal and provincial sales tax as well as gasoline tax rebates; calculates the amount of rebates; completes tax rebate applications; ensures that refund is received; discusses unusual problems with immediate supervisor; contacts federal government official for interpretation; ensures that refunds are deposited in appropriate departmental accounts.

Provides advice to departmental officials regarding tendering and purchasing procedures including tender exempt conditions, specification preparation, tendering opening procedures and bid evaluation factors; contacts provincial government officials to obtain explanation or interpretation of legislation.

Maintains tender and tax rebate records; ensures that records are complete and accurate.

Performs related work as required.

REQUIREMENTS OF WORK

Considerable experience in purchasing or related work; graduation from high school supplemented by completion of a two year accounting program from an institution of technology or trades school; or any equivalent combination of experience and training which provides the following knowledge, abilities and skills:

Considerable knowledge of University regulations and procedures relating to tendering and purchasing.

Considerable knowledge of the overall organization and procedures of the University as they relate to purchasing and tendering.

Considerable knowledge of federal and provincial sales tax regulations and procedures.

Knowledge of the principles and practices of purchasing.

Knowledge of the University's Banner accounting system.

Knowledge of general office practices and procedures.

Ability to make decisions in accordance with regulations and established policy.

Ability to carry out tendering and excise tax refund procedures in an expeditious and accurate manner.

Ability to examine financial documents and reports.

Ability to work independently on a variety of assignments.

Ability to maintain varied tendering and purchasing records.

Ability to effectively communicate both orally and in writing.

Ability to establish and maintain effective working relationships with staff, faculty, external suppliers and federal and provincial government officials.

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