

CARMICHAEL WATER DISTRICT
Classification Specification

Job Class: Inventory Specialist Series (IS1 – IS2)
FLSA Status: Non-Exempt
Supervisor: Assistant General Manager
Effective Date: July 1, 2019

Description

Under supervision, Inventory Specialists perform a variety of difficult and complex work in the areas of purchasing, warehouse, inventory, facility maintenance, meter reading program, and customer service.

Distinguishing Characteristics

Inventory Specialist 1 (IS1): This is the entry level class in the Inventory Specialist series. Specialists in this class are required to be fully trained and knowledgeable in all procedures related to assigned areas of responsibility. Distinguished from other classes within the series by the possession of required education, certification, and by the knowledge and ability to perform the full range of duties assigned at an advanced and independent level.

Inventory Specialist 2 (IS2): This is the journey level class in the Inventory Specialist series. Specialists in this class are required to be highly trained and knowledgeable in all procedures related to assigned areas of responsibility. Distinguished from other classes within the series by the possession of required education, certification, and by the knowledge and ability to perform the full range of duties assigned at a proficient and independent level.

Specialists may be advanced provided they meet the required education, experience, and minimum qualifications for the job class as described in the Inventory Specialist Series job description.

Supervision Received and Exercised

Inventory Specialist 1 (IS1): Receives immediate supervision from the Supervisor or District Designated Representative and may receive technical and functional direction from other journey level staff. May exercise technical and functional direction over less knowledgeable or experienced departmental staff.

Inventory Specialist 2 (IS2): Receives immediate supervision from the Supervisor or District Designated Representative and may receive technical and functional direction from other journey level staff. Exercises technical and functional direction over less knowledgeable or experienced departmental staff.

Essential Duties and Responsibilities

The following duties are typical for this classification. Depending upon the assignment, the employee may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices. Management retains the right to add, remove, or change duties at any time.

Organize and prioritize assigned workload in order to complete assigned activities and projects.

Purchasing/ Warehouse/Inventory

- Assist all departments in identifying sources and obtaining product information. Solicit competitive bids and Requests for Proposals (RFP) as applicable.
- Prepare purchase orders (obtain accurate pricing information, delivery dates, and terms of purchase). Secure proper authorization and signatures for purchases.
- Compile and accurately enter purchase and receipt data into the purchasing and inventory modules of the financial software.
- Identify vendors and obtain quotes of prices of goods to be purchased; research new parts, substitute products, and pricing

- Process packing lists for receipt against purchase order, reconcile discrepancies, and inspect materials for damage or defects.
- Expedite purchase orders as directed. Initiate action for the return and credit of incorrect or defective product received from vendors.
- Research discrepancies in purchases and duplicate orders.
- Track material usage and establish and maintain reorder points
- Oversee the inventory (accurate inventory counts, reordering and restocking incoming and outgoing parts, disposal and surplus property). Relocate parts as needed to keep the inventory areas operating as efficiently as possible.
- Ensure compliance of risk management and loss control.
- Ensure reconciliation between purchasing, receiving, inventory, and general ledger.
- Receive, stock, issue materials, supplies, tools, parts, and equipment utilizing a computer purchasing and inventory control system ensuring proper records and requisitions.
- Load and unload parts and materials using a forklift, hand truck, other handling equipment.
- Maintain storage areas, shelves, and outside yard in a clean and orderly condition.
- Manage surplus/disposal program.
- Pick up will call products from vendor.
- Deliver information/notifications/parts to field.
- Coordinate and conduct all scheduled and unscheduled physical inventories.
- Perform basic housekeeping in warehouse.

Facility Maintenance

- Plan, organize, and oversee inspection, maintenance, and repairs of the District Office and Corporation Yard.
- Responsible for building's quality control – inspect facility and work areas to eliminate deficiencies, improve facilities, and make recommendations.
- Prepare regular schedule of District's standard of care and long range plan.
- Continually evaluate the effectiveness of maintenance procedures and programs and make changes/recommendations.
- Inspect facilities (interior and exterior) for cleanliness.
- Administer the facility maintenance work order system and ensure work orders are completed on schedule.

Fleet Management

- Measure and ensure appropriate fuel levels in fuel tanks.
- Maintain fuel consumption and variance reports.
- Maintain and complete vehicle maintenance logs and schedule service.
- Coordinate repairs and arrange for testing and required certifications (e.g.: diesel requirements, smog, etc.).
- Pick up and deliver vehicles and equipment for repairs.
- Ensure DMV, insurance, and District records are maintained accurately.

Manage outside vendors/consultants for department business operations. Maintain appropriate business relationship with vendors to assure honesty, cooperation, and responsiveness to meet the needs of the District.

Perform general maintenance activities (i.e. maintain, clean, oil, lube, store, etc.), and general housekeeping (i.e. sweep, clean, etc.), facilitate repairs as needed, and complete safety and compliance activities (i.e. inspection, logs, reports, etc.) which include but are not limited to:

- Vehicles.
- Equipment.
- Facilities.
- Tools.

Perform a variety of duties associated with meter reading and GPS data collection. Duties include but are not limited to:

- Read, inspect, test, and troubleshoot water meters.
- Locate and inspect properties for existing facilities (field checks).
- Maintain District's records.
- Maintain equipment and software (including: work with IT and vendors for upgrades, repairs, warranty, etc.).
- Upload/download, update, and correct data.
- Evaluate and make recommendations on improvements.
- Work with other District staff to ensure pertinent data is shared in a timely fashion.
- Assist others to read, inspect, test and troubleshoot District customer's water meters.
- Operate meter reading and GPS equipment.
- Verify power reserves and charge equipment as necessary.
- Assist other staff in use of equipment as necessary.

Administrative Support:

- Ensure that all service orders and associated paperwork are completed accurately and returned each day.
- Compose responses to correspondence containing routine or technical inquiries.
- Gather, organize and facilitate distribution of a variety of information and materials.
- Provide general administrative assistance.
- Deliver door hangers, packets, and information.
- Contact and coordinate with vendors, customers, and other organizations.
- Procure and maintain water efficiency supplies and equipment.
- Assist in the development and monitoring of an assigned program budget.

Reports, Correspondence, Records and Files:

- Research, analyze, and compile data for reports.
- Create charts and graphs from raw data in appropriate formats.
- Create Excel spreadsheets and PowerPoint presentations from source materials.
- Compose complex correspondence, reports, ordinances, resolutions, and other documents from brief oral or written instructions, rough notes and/or recordings.
- Produce a variety of mailing lists, labels, office records, and forms.
- Maintain accurate and up-to-date files by developing, preparing, and monitoring tickler files, various logs, and records.
- Prepare and purge files following the District's records retention policy.
- Develop and maintain current/updated technical policies and procedures related to the activities of the department.
- Prepare necessary reports, RFPs, bids, and specifications for new equipment, contracts, services, and assigned projects.

Staffing and Training:

- Attend, support and participate in training, meetings, seminars, demonstrations, events and conventions as required.
- Provide training to staff.
- Participate in committees and regional groups (e.g. Safety or Star Committee, JPIA, etc.).

Policy:

- Comply with all District policies, procedures, rules and regulations including all safety standards, programs and procedures (e.g. Policy Manual, Rules and Regulations Manual, Emergency Response Plan, IIPP, etc.).
- Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.

Compliance:

- Ensure all work performed is completed to District standards.
- Participate and comply with safety programs and procedures for employees.
- Monitor local, state and federal regulations to ensure compliance.
- Comply with District, local, state and federal regulations; and prepare a variety of related reports.
- Analyze complex and technical procedural questions by researching, interpreting and explaining policies, procedures and regulations.
- Complete data requests, regulatory filings, and reports as required.
- Perform quality control on daily paperwork, reports (e.g.: monthly, quarterly, annually, etc.) and departmental records and database to ensure compliance.
- Work with consultants and other agencies on regulatory/compliance requirements, documents, and reports.
- Participate in regional and state water programs.

Customer Service:

- Provide excellent timely customer service.
- Inform customers of scheduled work and work in progress.
- Take necessary action to correct situations.
- Investigate departmental calls, complaints, reports of encroachment and vandalism and claims and take necessary corrective action.
- Assist staff regarding customer service for District customers as necessary.

Planning:

- Monitor and maintain inventory and purchases to stay within budget.
- Achieve efficiency through proper planning, organization, scheduling, and direction of program activities, resources, and projects.
- Evaluate and recommend improvements to increase efficiency and cost effectiveness.
- Prepare studies, reports, documents, and correspondence.
- Research, collect, organize and analyze data.

Customer Service:

- Build and maintain positive working relationships with co-workers and the public using principles of good customer service.

Qualifications

Inventory Specialist 1 (IS1):

Specialists in this class must possess **advanced knowledge and advanced abilities** identified below:

Knowledge of:

- Inventory/warehouse principles and implementations.
- Principles and practices of distribution system operations and maintenance processes.
- Risk management and loss prevention.
- Planning and organizing.
- Methods, tools, and equipment used in meter reading and GPS.
- Read and interpret piping and distribution diagrams, blue prints and maps.
- Water utility products.
- General office procedures including telephone, filing, typing.
- Operation of standard office equipment, personal computer and software applications for word processing, graphic presentations, spreadsheets, and other job-related software.
- Principles of mathematics and statistical analysis.
- Principles and practices of recordkeeping.
- Procedure maintenance.
- Federal, state, county, local, and District regulatory compliance.

- Principles and practices of effective oral and written communication.
- Standard safety practices and programs.
- Research and report writing.
- Budget development and fiscal controls.
- Customer service.
- Conflict resolution.

Ability to:

- Diagnose operational problems and correct or provide recommendations.
- Read and interpret maps.
- Provide technical assistance in the implementation of the department's programs.
- Oversee and manage projects.
- Plan, organize, manage, coordinate, and direct the department programs and functions.
- Perform mathematical computations and estimates.
- Skillfully use necessary equipment (i.e.: GPS, meter reading equipment).
- Perform light to moderate physical labor requiring strength, dexterity and agility.
- Work independently, demonstrating initiative and independent thinking.
- Effectively lead and train less qualified personnel.
- Perform duties in a professional manner and work well with others or in a team setting.
- Follow both oral and written instructions.
- Operate a motor vehicle.
- Adhere to safe work practices.
- Exercise good judgment.
- Effectively manage time and workload to maximize productivity.
- Manage multiple projects simultaneously.
- Gather, analyze, and organize data, maintain accurate records, and prepare reports.
- Develop and control budgets.
- Analyze situations and make sound recommendations in support of District goals.
- Communicate effectively both orally and in writing with the Board of Directors, District management, co-workers, and the public in one-to-one and group settings.
- Understand, interpret and apply laws, rules, regulations and ordinances relating to District activities.
- Effectively represent the District in a positive and professional manner at all times with the public, community groups, contractors, and other organizations.
- Respond to public, vendor, and co-worker requests in a timely, tactful, courteous and effective manner.
- Establish and maintain cooperative working relationships.
- Operate a variety of standard office equipment, telephone, electronic devices (i.e. laptop, smart phones, tablet, GPS, etc.), personal computer and software applications for GPS, word processing, graphic presentations, spreadsheets, and other job-related software.
- Maintain regular attendance and adherence to prescribed work schedule to conduct job responsibilities.

Inventory Specialist 2 (IS2):

Specialists in this class must possess **proficient knowledge and proficient abilities** of the Inventory Specialist 1 (IS1)

Physical Requirements

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. *Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

- Travel occasionally by airplane conducting District business.
- Travel regularly by vehicle for District related duties and activities.

- Communicate orally and in writing with District management, co-workers, and the public in one-to-one and group settings.
- Vision and hearing within normal ranges with or without correction.
- Regularly use telephone for communications.
- Regularly use electronic devices.
- Work in a field environment doing the following physical activities:
 - Regularly: sit, fine manipulation, ride in a vehicle.
 - Frequently: walk, stand, squat, climb, bend, stoop, twist, repetitive use of hands, grasp, push, pull, reach above and below shoulder level, lift and carry up to 60 lbs., operate equipment and hand tools, and operate vehicle.
 - Differentiate between and perceive color, sound, smell, taste, texture and form.
- Regularly work in an office environment: at a desk/table for an extended period of time, sit or stand for extended time periods, ability to bend (neck and waist), squat, climb, stoop, kneel, crawl, twist, grasp, fine manipulation, push, pull, reach, lift carry and move objects up to 25 pounds such as storage boxes, large binders, books, and small office equipment.

Environmental and Working Conditions

The environmental and working conditions herein are representative of those an employee encounters while performing the essential functions of this job. *Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- The performance of this position regularly requires exposure to job site, distribution and production areas with:
 - Field visits requiring the operation of a motor vehicle.
 - Exposure to environmental conditions:
 - Chemicals/Caustics, confined space, heights, allergenic plants/materials.
 - Dusts/mists/fumes/smoke/gases, wet damp surfaces, extreme heat/cold, inclement weather, noise.
 - Work on various types of terrain and footing which may be slippery or uneven.
 - Work around moving objects or vehicles.
- Certain areas require the use of personal protective and safety equipment (i.e. hard hats, safety vest, steel toed boots, safety glasses, hearing protection, etc.).
- Frequently work indoors in ambient room temperatures and lighting and be around office equipment as found in a typical office environment.

Education, Experience, and Certification

Required:

- Equivalent to the completion of the 12th grade.

Inventory Specialist 1 (IS1):

- One (1) full-time year of increasingly responsible experience performing purchasing and inventory management activities and related work.
- Possess and maintain Forklift Operator certification within two (2) months from date of hire.
- Possess and maintain a California State Water Resources Control Board (SWRCB) Distribution Operator Grade D1 Certification within twelve (12) months or two (2) consecutive exam periods from date of hire.

Inventory Specialist 2 (IS2):

- Three (3) full-time years of increasingly responsible experience performing purchasing and inventory management activities and related work including two (2) full-time years equivalent to an Inventory Specialist 1 with the Carmichael Water District.
- Possess and maintain a Forklift operator certificate within two (2) months from date of hire.
- Possess and maintain a SWRCB Distribution Operator Grade D1 Certification within twelve (12) months or two (2) consecutive exam periods from date of hire.

Licenses

Required:

- Possess and maintain a valid State of California Class C driver's license.
- Proof of good driving record as evidenced by freedom from multiple or serious traffic violations or accidents for at least two years duration.

License and Certification Maintenance: Employee is responsible to complete the designated number of contact hours (i.e.: continuing education and/or training requirements) and licensing requirements to maintain all required licenses and certifications as a condition of continued employment.

NOTE: *The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria that are performed by most incumbents, but other related duties may be performed. Not all duties listed are necessarily performed by each individual.*