

**PURCHASING & CONTRACTING
CONFLICT OF INTEREST CODE**

**APPENDIX A
DESIGNATED POSITIONS, DUTIES, AND CATEGORIES**

<u>Position</u>	<u>Duties</u>	<u>Category</u>
ADMINISTRATION		
Director	Serves as City’s Purchasing Agent. Creates and implements policies regarding City’s procurement and contracting activities. Ensures procurement and contracting activities comply with City, state, and federal requirements. Oversees solicitation of bids and issuance of contracts for supplies, materials, equipment, construction, and professional and non-professional services. Executes contracts and approves issuance of purchase orders. Manages and directs operations of Purchasing & Contracting Department.	1
Deputy Director	Directs daily operations of Purchasing & Contracting Department. Ensures procurement and contracting activities comply with City, state, and federal requirements. Creates and implements policies and procedures. Recommends or approves financial, budgetary, policy, administrative, systems, or contract award decisions. Executes contracts and approves issuance of purchase orders.	1
Program Manager	Supports Director and Deputy Director in managing departmental programs, initiatives, and operations. Ensures implementation of City, state, and federal policies, rules, and regulations. Recommends or approves financial, budgetary, policy, administrative, systems, purchasing, or contracting decisions. Supervises professional and sub-professional staff and ratifies their decisions. Executes contracts and approves issuance of purchase orders. Manages City warehouses.	1

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Program Coordinator	Assists in formulating policies and procedures related to programs administered by Purchasing & Contracting Department. Recommends or approves financial, budgetary, policy, administrative, systems, purchasing, or contracting decisions. Supervises professional and sub-professional staff and ratifies their decisions.	2
Information Systems Analyst	Administers departmental and City-wide information systems. Provides support and technical expertise in maintaining and using departmental and City-wide systems. Identifies system defects and enhancement needs and works with Department of IT to identify, develop, test, approve, and deploy solutions. Generates and analyzes data reports for management decision making and policy recommendations. Uses systems administrator access to resolve technical issues faced by users. Prepares, monitors, and analyzes department's IT needs and budget and recommends or decides on related procurement and contracting activities.	2

GOODS & SERVICES PROCUREMENT

Supervising Procurement Contracting Officer	Supervises purchasing and contracting staff and ratifies their decisions. Assists in recommending, formulating, and implementing policies, regulations, and procedures related to bid solicitations, contracting, purchase order issuance, and vendor/supplier performance. Responsible for providing professional guidance in the purchasing and contracting operations of various departments and interpreting related policies. Approves issuance of purchase orders.	2
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<u>Position</u>	<u>Duties</u>	<u>Category</u>
Senior Procurement Contracting Officer	Performs the more difficult, complex, and responsible procurement and contracting of goods and services for use by operating departments. Administers and manages bid solicitations and evaluations and awarded contracts. Reviews and approves purchase requisitions prior to purchase order issuance to vendors and suppliers. Recommends suppliers for contract award. Provides professional guidance to various departments regarding purchasing and contracting activities and interpretation of related policies. Approves issuance of purchase orders.	2
Associate Procurement Contracting Officer	Performs difficult, complex, and responsible procurement and contracting of goods and services for use by operating departments. Assists with administering and managing bid solicitations, bid evaluations, and awarded contracts. Reviews and approves purchase requisitions prior to purchase order issuance to vendors and suppliers. Provides professional guidance to various departments regarding purchasing and contracting activities and interpretation of related policies. Approves issuance of purchase orders.	2

PUBLIC WORKS CONTRACTING

Principal Contract Specialist (Senior Civil Engineer)	Plans and directs the work of Contract Specialists. Participates in complex contract administration. Negotiates, awards, administers, and terminates various types of contracts, including public work consulting, design, construction, and material and equipment contracts. Develops negotiation plans and strategies. Executes contracts and approves issuance of purchase orders. Prepares reports.	2
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Senior Contract Specialist (Associate Engineer – Civil)	Plans and directs the work of Contract Specialists and participates in the more highly complex duties. Recommends and negotiates financial decisions, such as the selection of contractors and service providers. Oversees bid solicitations and bid evaluations and recommends awarding of contracts. Executes contracts and approves issuance of purchase orders.	2
Contract Specialist (Assistant Engineer – Civil)	Assists with the negotiation, award, administration, and termination of contracts related to public works, construction, and architectural and engineering professional consultants. Assists with negotiating financial decisions, such as the selection of contractors and service providers. Executes contracts and approves issuance of purchase orders.	2

EQUAL OPPORTUNITY CONTRACTING

Supervising Management Analyst	Plans, assigns, supervises, reviews, and evaluates the work of subordinate staff. Performs variety of complex budgetary, fiscal, administrative, organizational, and programmatic analyses to support management decision making and policy recommendations. Evaluates vendor, supplier, or contractor qualifications, certifications, and participation with regard to diversity and equal opportunity to recommend contract awards.	2
Senior Management Analyst	Evaluates bids from vendors, suppliers, and contractors and makes recommendations on contract awards based on meeting equal opportunity contracting policies and requirements. Participates in bid evaluation panels. Evaluates workforce reports for compliance. Tracks participation levels of certified vendors, suppliers, and contractors in City-awarded contracts. Validates and tracks diversity certifications. Prepares and reviews reports to City Council, Mayor’s Office, and management. Assists with administering City’s Small/Local Business Enterprise Program. Conducts vendor outreach and pre-bid meetings.	2

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Associate Management Analyst	Assists with evaluating bids from vendors, suppliers, and contractors and making recommendations on contract awards based on meeting equal opportunity contracting policies and requirements. Provides support to bid evaluation panels. Assists with evaluating workforce reports for compliance. Tracks participation levels of certified vendors, suppliers, and contractors in City-awarded contracts. Validates and tracks diversity certifications. Prepares reports to City Council, Mayor's Office, and management. Assists with administering City's Small/Local Business Enterprise Program. Conducts vendor outreach and pre-bid meetings.	2

CENTRAL STORES

Stores Operations Supervisor	Supervises City-wide inventory control system and maintains system integrity, including accuracy of value and quantity on hand of all materials. Supervises Central Stores accounts payable section and purchase of warehouse inventory. Negotiates contracts and pricing with vendors and suppliers. Liaises with auditors, Department of Finance, and Department of IT regarding the management of warehouses and inventory. Arranges for disposal of City surplus by bid sales.	2
Storekeeper III	Oversees day-to-day operations of Central Stores or other warehouses. Plans, organizes, and directs receipt, inspection, storage, and issuance of City stock items. Arranges for disposal of City surplus by auction, bid sales, or discard. Processes City surplus for disposition. Monitors adherence to policies and procedures.	2
Storekeeper II	Plans, organizes, and directs receipt, inspection, storage, and issuance of City stock items. Arranges for disposal of City surplus by auction, bid sales, or discard. Processes City surplus for disposition. Monitors adherence to policies and procedures and may receive, inspect, and issue stock to departments.	2

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Storekeeper I	Manages day-to-day activities of assigned storeroom. Receives and inspects goods for proper quality and quantity. Places orders with pre-approved suppliers for stock items.	2

PUBLISHING SERVICES

Print Shop Supervisor	Coordinates a wide variety of print services. Analyzes printing job requisitions. Assesses the feasibility of in-house production and recommends the use of outside vendors or service providers when appropriate. Estimates costs of printing jobs requested by departments. Inspects work for quality control purposes. Maintains records of operations.	2
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CONSULTANTS / NEW POSITIONS

Consultant/New Positions	<p>Consultants and New Positions shall be included in the list of designated employees and shall disclose pursuant to the broadest disclosure category in the code subject to the following limitation:</p> <p>The Department Director or Deputy Director may determine in writing that a particular consultant or new position, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements in this section. Such written determination shall include a description of the consultant’s or new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Department Director’s or Deputy Director’s determination is a public record and shall be retained for public inspection in the same manner and location as this Conflict of Interest Code.</p>	3
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**APPENDIX B
DISCLOSURE CATEGORIES**

CATEGORY 1

All investments and business positions in business entities, and income from construction firms, building firms, real estate, or financial institutions, located in or doing business with the City of San Diego.

All interests in real property located in the City, including property located within a two-mile radius of any property owned or used by the City.

All reportable income, including gifts, from any person or business entity that supplies goods or services to the City of San Diego.

CATEGORY 2

Investments and business positions in any business entity that supplies goods or services to the City, that is a tenant of the City, that is an adverse party to the City in a legal proceeding, or that is granted authority by the City to use City facilities.

Income and gifts from any person or business entity that supplies goods or services to the City, receives goods or services from the City, that is a tenant of the City, that is an adverse party to the City in a legal proceeding, or that is granted authority by the City to use City facilities.

Interests in real property located in the City of San Diego, including property located within a two-mile radius of any property owned or used by the City.

CATEGORY 3

Consultants and new positions shall be included in the list of designated employees and shall disclose pursuant to the broadest disclosure category in this Code, subject to the following limitation:

The Department Director or Deputy Director may determine in writing that a particular consultant or new position, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements described in this section. Such written determination shall include a description of the consultant’s or new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Department Director’s or Deputy Director’s determination is a public record and shall be retained for public inspection in the same maimer and location as this Conflict of Interest Code.