



## **STATE OF COLORADO**

### **CLASS SERIES DESCRIPTION**

**July 1, 1999**

#### **MATERIALS HANDLER**

**D8G1XX TO D8G4XX**

#### **DESCRIPTION OF OCCUPATIONAL WORK**

This class series uses four levels in the Labor, Trades, and Crafts Occupational Group and describes practical work and physical handling of supplies, materials, equipment, foodstuffs, and merchandise in a storeroom or warehouse. Positions in this series receive, store, inventory, and distribute goods. Also included are those positions responsible for supervising the warehousing or storage operation. Although positions often process paperwork and maintain records in support of their work, it is not the primary emphasis of the occupation. If such record keeping and paperwork processing of transactions are the focus of a position, it should be allocated to another, more appropriate class series. For those positions that require training before entry into this series, one of the trainee class series should be considered.

**INDEX:** Materials Handler I begins on this page, Materials Handler II begins on page 3, Materials Handler III begins on page 5, and Materials Supervisor begins on page 7.

#### **MATERIALS HANDLER I**

**D8G1TX**

#### **CONCEPT OF CLASS**

This class describes the fully-operational stocking and distributing level. Positions in this level receive and unpack shipments; accept or refuse shipments after verifying the quality and quantity of contents against orders, bills of lading, and specifications and report any discrepancies; safely move, store, and rotate items; fill and deliver orders; physically count items periodically for perpetual or special inventories; initiate reorders from established reorder points by filling out forms, contacting the vendor, or reporting to a supervisor; pack, weigh, and label outgoing shipments; fill out paperwork or contact vendors to initiate reorders. The work often involves climbing, lifting, and operating power equipment to load, unload, move, stack, or tier items in the storage facility. This class typically describes standardized work but may also be used to train for a higher level in this series.

## **CLASS SERIES DESCRIPTION (Cont'd.)**

### **MATERIALS HANDLER**

**July 1, 1999**

#### **FACTORS**

**Allocation must be based on meeting all of the four factors as described below.**

**Decision Making** -- The decisions regularly made are at the defined level, as described here. Within limits prescribed by the operation, choices involve selecting alternatives that affect the manner and speed with which tasks are carried out. These choices do not affect the standards or results of the operation itself because there is typically only one correct way to carry out the operation. These alternatives include independent choice of such things as priority and personal preference for organizing and processing the work, proper tools or equipment, speed, and appropriate steps in the operation to apply. For example, a position determines the priority of work assignments, speed with which to fill orders, proper equipment to use in moving materials, proper storage method, or most cost-effective shipper. By nature, the data needed to make decisions can be numerous but are clear and understandable so logic is needed to apply the prescribed alternative. For example, a position decides to refuse unacceptable shipments, e.g., shortage, damage, or unacceptable substitutions. Positions can be taught what to do to carry out assignments and any deviation in the manner in which the work is performed does not change the end result of the operation.

**Complexity** -- The nature of, and need for, analysis and judgment is prescribed, as described here. Positions apply established, standard guidelines for the safe and efficient stocking and distribution of materials, which cover a variety of work situations and alternatives. Action taken is based on learned, specific guidelines that permit little deviation or change as the task is repeated. Any alternatives to choose from are clearly right or wrong at each step. Positions in this class rely upon established reorder points, vendors, price agreements, purchasing procedures, pricing formulas and refund guidelines, delivery schedules, inventory systems, customer specifications and catalogs, and operational procedures. For example, a position follows procedures and instruction sheets for the proper storage and handling of hazardous materials.

**Purpose of Contact** -- Regular work contacts with others outside the supervisory chain, regardless of the method of communication, are for the purpose of any of the following:

Exchanging or collecting information with contacts. This involves giving learned information that is readily understandable by the recipient or collecting factual information in order to solve factual problems, errors, or complaints. For example, a position contacts customers and vendors regarding price quotes, quantity discounts, delivery dates, and accuracy of shipments.

Detecting, discovering, exposing information, problems, violations or failures by interviewing or investigating where the issues or results of the contact are not known ahead of time. For example, positions interview vendors to track lost shipments and make alternate arrangements.

Advising, counseling, or guiding the direction taken to resolve complaints or problems and influence or correct actions and behaviors. For example, positions advise customers on ordering and storage methods to reduce spoilage, unsafe conditions, and waste or contact vendors and distributors to resolve complaints.

## **CLASS SERIES DESCRIPTION (Cont'd.)**

### **MATERIALS HANDLER**

**July 1, 1999**

**Line/Staff Authority** -- The direct field of influence the work of a position has on the organization is as an individual contributor. The individual contributor may explain work processes and train others. The individual contributor may serve as a resource or guide by advising others on how to use processes within a system or as a member of a collaborative problem-solving team.

**OR**

Some positions function as a work leader who is partially accountable for the work product of two or more full-time equivalent positions, including timeliness, correctness, and soundness. At least one of the subordinate positions must be in the same series or at a comparable conceptual level. Typical elements of direct control over other positions by a work leader include assigning tasks, monitoring progress and work flow, checking the product, scheduling work, and establishing work standards. The work leader provides input into supervisory decisions made at higher levels, including signing leave requests and approving work hours.

### **MATERIALS HANDLER II**

**D8G2XX**

#### **CONCEPT OF CLASS**

This class describes positions that perform work within established storeroom or warehouse operations, as described by the Materials Handler I, however, the complexity of the assignment is increased. Work often involves the resolution of disputes or claims that deviate from established guidelines, forecasting future needs and setting stock levels for items in the inventory where there is an absence of historical usage data, or selecting the brand and source of unique scientific or technical items for special orders where multiple descriptions exist. Some positions in this class may function as work leaders or, in a few cases, as working supervisors. The Materials Handler II differs from the Materials Handler I on the Complexity factor and may differ on Line/Staff Authority.

#### **FACTORS**

**Allocation must be based on meeting all of the four factors as described below.**

**Decision Making** -- The decisions regularly made are at the defined level, as described here. Within limits prescribed by the operation, choices involve selecting alternatives that affect the manner and speed with which tasks are carried out. These choices do not affect the standards or results of the operation itself because there is typically only one correct way to carry out the operation. These alternatives include independent choice of such things as priority and personal preference for organizing and processing the work, proper tools or equipment, speed, and appropriate steps in the operation to apply. For example, a position determines the priority of work assignments, speed with which to fill orders, proper equipment to use in moving materials, proper storage method, or most cost-effective shipment method. By nature, the data needed to make decisions can be numerous but are clear and understandable so logic is needed to apply the prescribed alternative. For example, a position decides to refuse unacceptable shipments, e.g., shortage, damage, or unacceptable substitutions. Positions can be taught what to do to carry out assignments and any deviation in the manner in which the work is performed does not change the end result of the operation.

## **CLASS SERIES DESCRIPTION (Cont'd.)**

### **MATERIALS HANDLER**

**July 1, 1999**

**Complexity** -- The nature of, and need for, analysis and judgment is patterned, as described here. Positions study relevant policies and procedures to determine what they mean and how they fit together in order to get practical solutions in the form of such things as dispute resolutions, alternative supply sources for unique or hard-to-find items, modified delivery schedules and routes, or forecasts and estimates for new items. Agency guidelines in the form of warehousing policy, operations, and work standards; inventory control procedures and systems; ordering, pricing, and return policies, guidelines, and procedures exist for most situations. Judgment is needed in locating and selecting the most appropriate of these guidelines which may change for varying circumstances as the task is repeated. This selection and interpretation of guidelines involves choosing from alternatives where all are correct but one is better than another depending on the given circumstances of the situation. For example, a position develops forms and adjusts steps of the existing inventory procedures to fit the needs of a special inventory, deviates from guidelines by arranging credit or returns when settling a particular dispute, rearranges the location and means of storage within existing space, or sets stock levels for existing items.

**Purpose of Contact** -- Regular work contacts with others outside the supervisory chain, regardless of the method of communication, are for the purpose of any of the following:

Exchanging or collecting information with contacts. This involves giving learned information that is readily understandable by the recipient or collecting factual information in order to solve factual problems, errors, or complaints. For example, a position contacts customers and vendors regarding price quotes, quantity discounts, delivery dates, and accuracy of shipments.

Detecting, discovering, exposing information, problems, violations or failures by interviewing or investigating where the issues or results of the contact are not known ahead of time. For example, positions interview vendors to track lost shipments and make alternate arrangements.

Advising, counseling, or guiding the direction taken to resolve complaints or problems and influence or correct actions and behaviors. For example, positions advise customers on ordering and storage methods to reduce spoilage, unsafe conditions, and waste or contact vendors and distributors to resolve complaints.

**Line/Staff Authority** -- The direct field of influence the work of a position has on the organization is as an individual contributor. The individual contributor may explain work processes and train others. The individual contributor may serve as a resource or guide by advising others on how to use processes within a system or as a member of a collaborative problem-solving team.

**OR**

Some positions function as a work leader who is partially accountable for the work product of two or more full-time equivalent positions, including timeliness, correctness, and soundness. At least one of the subordinate positions must be in the same series or at a comparable conceptual level. Typical elements of direct control over other positions by a work leader include assigning tasks, monitoring progress and work flow, checking the product, scheduling work, and establishing work standards. The

## **CLASS SERIES DESCRIPTION (Cont'd.)**

### **MATERIALS HANDLER**

**July 1, 1999**

work leader provides input into supervisory decisions made at higher levels, including signing leave requests and approving work hours.

### **OR**

Some positions function as unit supervisors who are accountable, including signature authority, for actions and decisions that directly impact the pay, status, and tenure of three or more full-time equivalent positions. At least one of the subordinate positions must be in the same series or at a comparable conceptual level. The elements of formal supervision must include providing documentation to support recommended corrective and disciplinary actions, signing performance plans and appraisals, and resolving informal grievances. Positions start the hiring process, interview applicants, and recommend hire, promotion, or transfer.

### **MATERIALS HANDLER III**

**D8G3XX**

### **CONCEPT OF CLASS**

This class describes positions that establish and revise working standards and procedures for the daily operation of the storeroom or warehouse. In addition, these positions participate in the work described by the Materials Handler II class. Some positions may have work leader responsibility, including planning assignments and controlling the timeliness, soundness, and accuracy of the work of others. The Materials Handler III differs from the Materials Handler II on the Decision Making factor.

### **FACTORS**

**Allocation must be based on meeting all of the four factors as described below.**

**Decision Making** -- The decisions regularly made are at the operational level, as described here. Within limits set by the specific process, choices involve deciding what operation is required to carry out the process. This includes determining how the operation will be completed. By nature, data needed to make decisions are numerous and variable so reasoning is needed to develop the practical course of action within the established process. Choices are within a range of specified, acceptable standards, alternatives, and technical practices. Operations determined by positions do not require prior approval before implementation and are typically used by others in the work unit. For example, a position determines the day-to-day procedures used by others in the operation to process orders; ship, receive, and efficiently store items; and ensure security and quality control of stock.

**Complexity** -- The nature of, and need for, analysis and judgment is patterned, as described here. Positions study relevant policies and procedures to determine what they mean and how they fit together in order to get practical solutions in the form of daily operations of a storeroom or warehouse, such as shipping and receiving procedures and inventory security procedures. Agency guidelines in the form of warehousing and inventory control systems, guidelines, and policies exist for most situations. Judgment is needed in locating and selecting the most appropriate of these guidelines which may change for varying circumstances as the task is repeated. This selection and interpretation of guidelines involves choosing from alternatives where all are correct but one is better than another depending on the given

**CLASS SERIES DESCRIPTION (Cont'd.)**

**MATERIALS HANDLER**

**July 1, 1999**

circumstances of the situation. For example, a position develops inventory and quality control procedures or develops and assigns delivery schedules and routes.

**Purpose of Contact** -- Regular work contacts with others outside the supervisory chain, regardless of the method of communication, are for the purpose of any of the following:

Exchanging or collecting information with contacts. This involves giving learned information that is readily understandable by the recipient or collecting factual information in order to solve factual problems, errors, or complaints. For example, a position contacts customers and vendors regarding price quotes, quantity discounts, delivery dates, and accuracy of shipments.

Detecting, discovering, exposing information, problems, violations or failures by interviewing or investigating where the issues or results of the contact are not known ahead of time. For example, positions interview vendors to track lost shipments and make alternate arrangements.

Advising, counseling, or guiding the direction taken to resolve complaints or problems and influence or correct actions and behaviors. For example, positions advise customers on ordering and storage methods to reduce spoilage, unsafe conditions, and waste or contact vendors and distributors to resolve complaints.

**Line/Staff Authority** -- The direct field of influence the work of a position has on the organization is as an individual contributor. The individual contributor may explain work processes and train others. The individual contributor may serve as a resource or guide by advising others on how to use processes within a system or as a member of a collaborative problem-solving team.

**OR**

The direct field of influence the work of a position has on the organization is as a work leader. The work leader is partially accountable for the work product of two or more full-time equivalent positions, including timeliness, correctness, and soundness. At least one of the subordinate positions must be in the same series or at a comparable conceptual level. Typical elements of direct control over other positions by a work leader include assigning tasks, monitoring progress and work flow, checking the product, scheduling work, and establishing work standards. The work leader provides input into supervisory decisions made at higher levels, including signing leave requests and approving work hours. This level may include positions performing supervisory elements that do not fully meet the criteria for the next level in this factor.

**MATERIALS SUPERVISOR**

D8G4XX

**CONCEPT OF CLASS**

This class describes positions that supervise the overall warehousing operation for an agency, region, or state facility. Work includes overseeing the daily ordering, receipt, storage, physical inventory, and distribution of items by developing procedures and delivery routes and schedules. Positions determine what items are carried in the inventory, supervise staff, oversee an operating budget by authorizing

## **CLASS SERIES DESCRIPTION (Cont'd.)**

### **MATERIALS HANDLER**

**July 1, 1999**

expenditures and preparing budget estimates, prepare plans to obtain space and equipment, and set ordering and delivery priorities for the warehouse.

### **FACTORS**

**Allocation must be based on meeting all of the four factors as described below.**

**Decision Making** -- The decisions regularly made are at the operational level, as described here. Within limits set by the specific process, choices involve deciding what operation is required to carry out the process. This includes determining how the operation will be completed. By nature, data needed to make decisions are numerous and variable so reasoning is needed to develop the practical course of action within the established process. Choices are within a range of specified, acceptable standards, alternatives, and technical practices. Operations determined by positions do not require prior approval before implementation and are used by others in the work unit. For example, a position determines the practical procedures necessary to process orders; ship, receive, and efficiently and safely store items; and ensure security and quality control of stock.

**Complexity** -- The nature of, and need for, analysis and judgment is patterned, as described here. Positions study relevant policies and procedures to determine what they mean and how they fit together in order to get practical solutions in the form of daily operations of a warehouse, such as shipping and receiving procedures and inventory security procedures. Agency guidelines in the form of purchasing and inventory control guidelines and policies exist for most situations. Judgment is needed in locating and selecting the most appropriate of these guidelines which may change for varying circumstances as the task is repeated. This selection and interpretation of guidelines involves choosing from alternatives where all are correct but one is better than another depending on the given circumstances of the situation. For example, a position develops inventory and quality control procedures or develops and assigns delivery schedules and routes.

**Purpose of Contact** -- Regular work contacts with others outside the supervisory chain, regardless of the method of communication, are for the purpose of any of the following:

Exchanging or collecting information with contacts. This involves giving learned information that is readily understandable by the recipient or collecting factual information in order to solve factual problems, errors, or complaints. For example, a position contacts customers and vendors regarding price quotes, quantity discounts, delivery dates, and accuracy of shipments.

Detecting, discovering, exposing information, problems, violations or failures by interviewing or investigating where the issues or results of the contact are not known ahead of time. For example, positions interview vendors to track lost shipments and make alternate arrangements.

Advising, counseling, or guiding the direction taken to resolve complaints or problems and influence or correct actions and behaviors. For example, positions advise customers on ordering and storage methods to reduce spoilage, unsafe conditions, and waste or contact vendors and distributors to resolve complaints.

## **CLASS SERIES DESCRIPTION (Cont'd.)**

### **MATERIALS HANDLER**

**July 1, 1999**

**Line/Staff Authority** -- The direct field of influence the work of a position has on the organization is as a unit supervisor. The unit supervisor is accountable, including signature authority, for actions and decisions that directly impact the pay, status, and tenure of three or more full-time equivalent positions. At least one of the subordinate positions must be in the same series or at a comparable conceptual level. The elements of formal supervision must include providing documentation to support recommended corrective and disciplinary actions, signing performance plans and appraisals, and resolving informal grievances. Positions start the hiring process, interview applicants, and recommend hire, promotion, or transfer.

### **OR**

In a few cases, the position is a second-level supervisor who is accountable for multiple units through the direct supervision of at least two subordinate Unit Supervisors; and, has signature authority for actions and decisions that directly impact pay, status, and tenure. At least one of the subordinate positions must be in the same series or at a comparable conceptual level. Elements of formal supervision must include providing documentation to support recommended corrective and disciplinary actions, second-level signature on performance plans and appraisals, and resolving informal grievances. Positions start the hiring process, interview applicants, and recommend hire, promotion, or transfer.

### **ENTRANCE REQUIREMENTS**

Minimum entry requirements and general competencies for classes in this series are contained in the State of Colorado Department of Personnel web site.

For purposes of the Americans with Disabilities Act, the essential functions of specific positions are identified in the position description questionnaires and job analyses.

### **CLASS SERIES HISTORY**

Effective 7/1/99 (KKF). LTC consolidation study changed the class codes from D1R to D8G. Draft published 3/31/99 and proposed 5/24/99.

Effective 7/1/97 (KKF). Change classes, grades, occupational group, and included class placement of positions. Published proposed 3/3/97 and draft 2/1/97.

Effective 9/1/93 (AAH). Job Evaluation Resign Project. Published storekeeper (G3G1TX - G3G3XX) and supply officer (H1T1IX - H1T4XX) proposed 5/17/93.

Revised 9/1/88. Changed class code, entrance requirements, and pay relationship for Stock Clerk (2400); grade, entrance requirements, and deleted options for Storekeeper A (2402); deleted options for Storekeeper B (2404); created Senior Storekeeper (2405); and, changed entrance requirements for the supply series (2406-2412).

Revised 7/1/87. Changed grade, pay relationship, and entrance requirements for Property Control Clerk(2044).

**CLASS SERIES DESCRIPTION (Cont'd.)  
MATERIALS HANDLER  
July 1, 1999**

Revised 7/1/83. Changed class code for Stock Clerk (2400); grade and pay relationship for Storekeeper A (2402); cyclical review of Storekeeper B (2404).

Revised 7/1/82. Changed grade and pay relationship for Stock Clerk (2400).

Revised 1/1/79. Created the Surplus Property Screener (2412).

Created 1/1/75. Property Control Clerk (2044), Stock Clerk (2400), Storekeeper (2402-2404), Supply Officers (2406-2408), and Senior Supply Officer (2410).

**SUMMARY OF FACTOR RATINGS**

<b>Class Level</b>	<b>Decision Making</b>	<b>Complexity</b>	<b>Purpose of Contact</b>	<b>Line/Staff Authority</b>
Materials Handler I	Defined	Prescribed	Exchange, Detect, or Advise	Indiv. Contributor or Work Leader
Materials Handler II	Defined	Patterned	Exchange, Detect, or Advise	Indiv. Contributor, Work Leader, or Unit Supervisor
Materials Handler III	Operational	Patterned	Exchange, Detect, or Advise	Indiv. Contributor or Work Leader
Materials Supervisor	Operational	Patterned	Exchange, Detect, or Advise	Unit Supervisor or Manager