

# New York State Department of Civil Service

DIVISION OF CLASSIFICATION & COMPENSATION

## Classification Standard

**Occ. Code 0232100**

<b>Contract Management Specialist 1, Grade 18</b>	<b>0232100</b>
<b>Contract Management Specialist 2, Grade 23</b>	<b>0232200</b>
<b>Contract Management Specialist 3, Grade 27</b>	<b>0232300</b>
<b>Contract Management Specialist 4, M-4</b>	<b>0232400</b>

## Brief Description of Class Series

Contract Management Specialists negotiate, develop, prepare, review, implement, process, track and provide fiscal and administrative oversight of contracts. They audit and process contracts, procurements, claims and vouchers; approve and review contract payments to ensure that the payments are in accordance with contract terms; review contractor performance, including price adjustments, amendments, contract interpretation and contract compliance issues; review budget modifications and contract amendments to determine the impact on the contract and to ensure continued compliance with applicable regulations; and provide technical assistance related to New York State's laws, rules, regulations and policies on contract administration to State agency staff, individuals, or organizations.

## Distinguishing Characteristics

Contract Management Specialists are distinguished by the number, value and complexity of contracts, and size and level of subordinate staff. Positions at the Office of the State Comptroller approve or deny contracts; positions at other agencies evaluate and recommend approval or denial of contracts.

*Contract Management Specialist 1:* full performance level; under the general direction of a Contract Management Specialist 2, publishes contract and procurement requirements for bidders; develops, evaluates or reviews contracts, Requests for Proposals (RFPs), Invitation for Bids (IFBs), Requests For Qualifications (RFQ's), Requests For Information (RFI's), Requests for Application (RFA's), Sole/Single Source Procurements, and other related financial documents; performs routine administrative processes associated with the contracts, reviews contractor performance and compliance; performs contract monitoring tasks including addressing any necessary contract modifications and contract amendments; may supervise clerical or paraprofessional staff.

*Contract Management Specialist 2:* first supervisory level; under the general direction of a Contract Management Specialist 3, publishes contract and procurement requirements for bidders; evaluates or reviews all types and levels of contracts and related financial documents; performs many of the same activities as Contract Management Specialist 1, but contracts and other related financial documents are typically more complex or may have Statewide ramifications and involve complicated inter-agency financial relationships; supervises multiple Contract Management Specialists 1 and/or paraprofessional staff.

*Contract Management Specialist 3:* second supervisory level; under the general direction of a Contract Management Specialist 4 or related title at an agency's contract management office, or Procurement Manager 1 or 2, at the Office of General Services, manages contract management or contract procurement teams comprised of multiple Contract Management Specialists 2 to oversee the processing and administration of a wide variety of contracts or contract procurement related activities.

*Contract Management Specialist 4:* managerial level; under the general direction of higher level staff, function as a director or assistant director of an agency's contract management program supervising multiple Contract Management Specialists 3 assigned a wide variety of contracts and contract procurement-related activities

### Related Classes

Human Resources Specialists (Benefits Contracts) develop specifications and evaluation criteria for benefits procurements; negotiate contracts and amendments; and manage contracts with insurance companies and other vendors engaged in providing services for one or more aspects of an employee benefit.

Contract Management Specialists (Health Benefit Exchange) manage health and dental plans offered through the Individual Marketplace Qualified Health Plans and Essential Plans, and the Small Business Marketplace, from original solicitation of plans, through implementation, plan performance evaluation, and operations.

Purchasing Agents are responsible for the purchase of a wide variety of supplies, materials, equipment and services required by State agencies and institutions. Purchasing activities are governed by New York States laws, rules, regulations and policies administered by the Office of General Services, and Office of the State Comptroller.

### Illustrative Tasks

*Contract Management Specialist 1:* reviews proposed contracts for fiscal and programmatic correctness, adherence to State policy, compatibility with agency programs and goals, availability of funds, and appropriateness of rates; conducts cost

evaluations and prepares or assists with the preparation of cost evaluation reports; prepares preliminary reports and recommendations to approve or reject contracts; reviews procurement records to ensure adherence to all applicable laws, rules, and regulations and ensure proposed contracts represent the best value to New York State; analyzes and tracks Minority and Women-Owned Business Enterprise (MWBE) and Service-Disabled Veteran-Owned Business (SDVOB) contract goals; drafts comprehensive program reports, components of reports, or report summaries; resolves problems identified by agency staff or vendors with the contract, RFPs, IFBs, RFQ's, RFI's, RFA's, Sole/Single Source Procurements, or other related financial documents; documents major or difficult issues or problems and refers them to higher level staff; drafts appropriate bid documents to ensure adherence to applicable rules, regulations and guidelines, and fiscal objectives; drafts written responses to interested parties on contract awards and contract status; provides guidance, technical assistance, and training to agency staff and/or potential bidder(s) to facilitate the contract and procurement processes, ensuring all control requirements are met; provides guidance to agency staff on the evaluation and selection process for various procurement methodologies to help prevent bid protests by unsuccessful bidders; evaluates bids and works with program to determine recommended awardee; ensures accurate execution of all documents needed for the procurement record; reviews contractor performance, including price adjustments, amendments, contract interpretation and contract compliance issues; reviews budget modifications and contract amendments to determine the impact on the contract and to ensure continued compliance with applicable regulations; develops model contracts to be used by the agency as a guideline for excellence in procurement methodology; recommends improvements to contract management related office policies and procedures; and may develop solicitation documents such as scope of work, mandatory requirements, qualifications, and contract evaluation.

*Contract Management Specialist 2:* performs all duties of Contract Management Specialist 1; independently reviews and recommends approval/disapproval of more difficult RFPs, IFBs, RFQ's, RFI's, RFA's, Sole/Single Source Procurements, and other related financial documents; submits procurement documents to the Office of the State Comptroller; performs on-site and central reviews of contract implementation and performance; monitors voucher payment process for assigned contracts; monitors purchasing process; proposes changes to existing program guidelines or assists in the development of new guidelines; participates in the bidder debriefing session; conducts or directs research into prevailing industry trends and prices; and performs the full range of supervisory duties such as performance evaluations, time and attendance and staff training.

*Contract Management Specialist 3:* directs staff and oversees the submission of procurement documents to the Office of the State Comptroller for final review and approval; oversees the development and maintenance of systems to monitor all contracts for compliance with contract terms and conditions, federal and state laws, rules, regulations, and payment criteria; monitors the development and management of high value, complex contracts, RFPs, IFBs, RFQ's, RFI's, Sole/Single Source

Procurements and other related legal and financial documents; resolves the more complex and difficult complaints and conflicts regarding contract execution, development, amendments, and fiscal cost reports; develops and implements training programs on procurement procedures and guidelines; oversees the analysis, goal setting activities, and utilization tracking of MWBE and SDVOB goals; and performs the full range of supervisory duties.

*Contract Management Specialist 4:* oversees and reviews the development of procurement policies and procedures; plans and budgets for contracting and related program activities; resolves the most complex and difficult complaints and conflicts regarding contract execution, development, amendments, and fiscal cost reports; directs the development and implementation of training programs on procurement procedures and guidelines; represents the agency on statewide committees or inter-agency workgroups related to procurement or contracting; directs the analysis, goal setting activities, and utilization of MWBE and SDVOB contracts; performs administrative duties assigned to Contract Management Specialist 3; and performs the full range of supervisory duties.

#### Minimum Qualifications

##### *Contract Management Specialist 1*

Open Competitive: bachelor's or higher degree AND two years of professional experience managing contracts and related budgets including one or more of the following areas: negotiation with contractors and vendors; fiscal management, including bidding, payment, analysis, and fiscal reporting; contract development, including developing requests for proposals; contract execution, including securing signatory approval from control agencies; monitoring and review of contract terms; OR bachelor's or higher degree and completion of a two-year traineeship.

##### *Contract Management Specialist 2*

Promotion: one year of permanent competitive service as a Contract Management Specialist 1.

##### *Contract Management Specialist 3*

Promotion: one year of permanent competitive service as a Contract Management Specialist 2.

*Contract Management Specialist 4*

Promotion: one year of permanent competitive service as a Contract Management Specialist 3.

Parenthetic Attachment

**Note:** Classification Standards illustrate the nature, extent and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all of the work that might be appropriately performed by a class. The minimum qualifications above are those which were required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum qualification requirements for appointment or examination.

Date: 2/2019

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## Parenthetic Attachment

*Contract Management Specialist 1 (Market Analysis)*: full performance level; under the general direction of a Contract Management Specialist 2 (Market Analysis), is assigned to the Office of General Services, Energy Planning and Procurement Group; conducts modeling and forecast trending for strategic energy utilization initiatives; develops and organizes energy performance reports for both internal and external use; develops and maintains a thorough knowledge and understanding of all New York State electric and natural gas utilities tariffs and operations; evaluates and reviews energy costs for OGS customers; assists New York State Procurement with natural gas requests for proposals; and aggregates agency facilities by utility to reduce costs.

*Contract Management Specialist 2 (Market Analysis)*: first supervisory or advanced performance level; under the general direction of a Contract Management Specialist 3 at the Office of General Services, Procurement Division or under the direction of the Assistant Director Energy Planning and Procurement, in the Energy Planning and Procurement Group, functions as industry expert; identifies and analyzes stakeholders, and assesses their level, interest, or influence on impact by considered procurement strategies; investigates sources of supply for specific contracting areas; formulates and develops guidelines, policies, and procedures and develops alternatives/strategies for programs, both internally and externally for agency buyers on statewide levels; serves as liaison with industry, associations, and governmental entities; develops program goals and plans for implementation, and prepare special studies and reports; develops, provides, and recommends staff training in targeted procurement areas and best practices; and performs the full range of supervisory duties such as performance evaluations and time and attendance.

### Minimum Qualifications

#### *Contract Management Specialist 1 (Market Analysis)*

Non-competitive: six years of experience as an analyst, including at least two years of specialized experience\*.

#### *Contract Management Specialist 2 (Market Analysis)*

Non-competitive: seven years of experience as an analyst or manager, including at least three years of specialized experience\*.

\*Substitution: A bachelor's degree may be substituted for four years of experience.

\*The field of specialization varies for each position. The specialized markets include: telecommunications; software and services; agriculture; education; health/medical; fuels/energy; roadway; business systems; emergency services; service contracts; finance; and communications/intergovernmental.