

**STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION**

**CONTRACTS SPECIALIST
CLASSIFICATION SERIES**

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Admin. Code, for making classification decisions relative to present and future professional positions which function as Contracts Specialists. This classification specification is not intended to identify every duty which may be assigned to positions, but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions must be based on the “best fit” of the duties within the existing classification structure. The “best fit” is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This series encompasses professional positions which function as Contracts Specialists. Positions allocated to this classification series develop and administer contracts between the State and the Federal government, local units of government or private sector organizations for the provision of services; negotiate and draft contract language; determine reporting requirements; monitor contracts to ensure compliance with Federal and State laws and regulations; monitor vendors and other contractees for compliance with contract requirements; conduct on-site audits; evaluate effectiveness of contracted services; conduct studies of programs, policies and procedures and recommend alternatives and improvements; and provide consultation and expertise to agency management in the assigned program area.

C. Exclusions

Excluded from this series are the following types of positions:

1. Position which do not spend the majority of their time (50% or more) performing professional Contracts Specialist duties.
2. Positions which do not meet the statutory definition of professional as defined in Wis. Stats. 111.81(15).

3. Positions which spend the majority of their time performing duties that are more appropriately classified as Grants Specialist work.
4. Positions which specialize in a particular function and spend the majority of their time on duties such as planning, budgeting, training or financial accounting or auditing.
5. Positions which spend the majority of their time performing duties that are more appropriately classified as Financial Specialist duties.
6. Positions which spend the majority of their time performing duties that are more appropriately classified as Purchasing Agent duties.
7. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression Through This Series

Employees enter positions within this classification series by competitive examination. Progression to the Senior or Advanced level will occur through reclassification.

E. Differentiating Grants Specialist Positions from Contracts Specialist Positions

Contracts Specialist positions develop and administer contracts between the State of Wisconsin and local governments, private organizations and other entities for programs, projects and other services which are mandated by State or Federal law; conduct Request For Proposals (RFP's) for specific services to be provided to the state; develop contracts for the State with local governments and other entities; monitor the vendors or other entities activities for compliance with the contract; and may administer the grievance and complaint process.

After a grant application has been approved, **Grants Specialist** positions develop and administer contracts which specify the requirements of the project which has been approved for State and/or Federal funding. Thus, some overlap occurs between Grants Specialist and Contracts Specialist positions.

The duties described in this paragraph differentiate **Grants Specialist** positions from **Contracts Specialist** positions. **Grants Specialist** positions administer grants from a funding source which allows flexibility and discretion in the development of proposals which may qualify for grant funding, including how the money may be spent, the scope and impact of the funded program or project, the kinds of projects or programs that may be funded, the criteria by which grant awards will be made, and the criteria by which the grant project will be evaluated upon completion. **Grants Specialist** positions provide consultation to the applicants in developing grant proposals. After a grant is awarded to an applicant, a contract is developed between the State and the grantee outlining the requirements of the project. **Grants Specialist** positions analyze the results of the grant projects to develop or modify the grant subject matter area's program planning, policies, and procedures.

In contrast, **Contracts Specialist** positions have more defined rules and regulations to apply. For example, the federal government may have well established laws and rules which govern the program area which the State contracts out to be administered by county or local governments.

The State has more limited discretion in determining what services will be provided or how they will be provided because of Federal requirements.

A good example of a **Contracts Specialist** and a **Grants Specialist** position in similar program areas would be the Food Stamps (FS) Program. The Federal government provides funding to the State of Wisconsin for the FS program and the State develops contracts with the counties to administer the program on a local basis. A **Contracts Specialist** develops the state/county and state/provider contracts language; provides contract interpretation; and prepares and monitors county and provider allocations, funding reimbursement and distribution methodologies.

Please refer to the Grants Specialist - Senior representative position entitled "Error Reduction Grants Specialist." This position administers a \$1.6 million annual grants program to develop error reduction projects which will protect the state from possible Federal fiscal sanctions for errors in the FS, Aid to Families with Dependent Children, and Medical Assistance programs. This position works with local agencies as they develop proposals for error reduction projects; establishes criteria for application review; develops the contract language after the project has been approved; monitors approved projects through progress reports and on-site visits; prepares reports on the project results; and recommends improvements in the program planning, policies and procedures for this program area.

II. DEFINITIONS

CONTRACTS SPECIALIST

This classification level is used as an entry progressing to a development level for Contracts Specialists. Work is performed under close progressing to limited supervision.

CONTRACTS SPECIALIST - SENIOR

Positions allocated to this classification level function as Contracts Monitors or Contracts Specialists.

Positions which function as Contract Monitors spend the majority of their time on the following duties: monitor contracts to ensure compliance with the requirements of the contract language and Federal and State laws and regulations; provide interpretation of the contract language to contractees, clients or customers of the contracted services, and other interested parties; process contracts, ensuring that the appropriate forms are completed and signed; conduct the Solicitation or Request for Purchase (RFP) bidding process; maintain contract forms and records; review reports and data; conduct audits and on-site visits in order to ensure compliance with the contract requirements; and may administer the grievance/complaint procedure. Work is performed under general supervision.

Positions which function as Contracts Specialists develop and administer contracts between the State and the Federal government, local units of government or private sector organizations for the provision of services; develop and evaluate bid letting procedures and requirements; negotiate and draft contract language; develop criteria by which contracts will be evaluated and awarded; award or coordinate the review and selection process for the awarding of contracts; approve payments; determine reporting requirements; process insurance policies; monitor contracts to ensure compliance with Federal and State laws and regulations; monitor contractees for compliance with contract requirements; review reports and other data; conduct on-site audits; evaluate effectiveness of contracted services; conduct studies of

programs, policies and procedures and recommend alternatives and improvements; and provide consultation and expertise to agency management in the assigned program area.

Representative Contracts Monitor Positions

Department of Health and Family Services, Bureau of Health Care Financing (MA) Assistant Contracts Monitor - This position responds directly to Managed Care Providers, Medical Assistance (MA) recipients, advocates and county social service agencies regarding the Managed Care Initiative; assists Contract Monitors in resolving county social services inquiries regarding recipient eligibility; assists Contract Monitors with on-site and desk audits; coordinates and reviews the monthly audit of the Aged Exemption Report which is provided by the fiscal agent to monitor exemption status of recipients and threshold levels; analyzes and updates Primary Provider Program (PPP) recipient informational materials based on any changes in the PPP provider's agreement that affect MA recipient and Managed Care Providers; and develops and maintains computerized statistical reporting system of PPP enrollment, assignment summary and exemption log.

Department of Health and Family Services, Bureau of Health Care Financing Primary Care Provider Contracts Monitor - This position monitors Primary Care Providers (PPP) agreements for the program in accordance with Federal and State requirements; guarantees the provision and accessibility of quality health services to MA recipients within the program; assists in developing and preparing RFP's and agreements to assure language complies with state and federal law and program goals; reviews reports and data, and conducts audits and on-site visits in order to monitor Primary Care Providers (PCP's) agreements to ensure compliance in the accessibility and quality of health services provided by PCP's to MA recipients; identifies and recommends policy modification; handles inquiries and/or disputes from PCP's, recipients, advocacy groups, and other interested parties relative to the PCP agreements, including eligibility issues, MA covered services, recipient enrollment status, and provision and payment of health services; and administers the PPP grievance/complaint procedure.

Department of Health and Family Services, Bureau of Health Care Financing HMO Contracts Monitor - This position monitors and evaluates Health Maintenance Organization (HMO) contracts to determine compliance relative to assuring access and quality of health services provided by HMO's to Medical Assistance participants; monitors contracts for compliance with Federal and State requirements; assists in developing RFP's and contracts; responds to inquiries and/or disputes from HMO's, recipients, advocacy groups and other interested parties relative to the HMO contract including eligibility issues, covered services, recipient enrollment status, and provision and payment of health services; meets with HMO Administrators to resolve HMO system/contract concerns; and administers the HMO grievance/complaint procedure.

Representative Contract Specialist Position

Department of Transportation, Division of Transportation Infrastructure Development, Bureau of Highway Construction Contracts Specialist - This position administers the department's annual highway construction, maintenance and traffic program's contractual and bonding requirement procedures for programs in excess of \$650 million; develops policies and procedures, including language requirements, for the bid letting process; provides technical advice to highway districts, counties and the highway construction industry for contract requirements; maintains records for all construction projects opened to the competitive bid process, including bidding proposals, bid guarantee checks, as well as county and city agreed unit price and service and supply contracts

and razing and removing contracts; provides detailed guidance to District offices, surety companies and agencies, and the contracting industry regarding bid bond and annual bid bond requirements and procedures; answers inquiries relating to the bidding process; coordinates the preparation of contract document packages; reviews and processes contract document packages; compiles financial information and other data for completion of recommendations to the Governor for contract and bond approval; reviews, rewrites, edits and processes Governor approval documents and attachments; audits and reviews contractual documents submitted by contractors to ensure compliance with established policies and procedures; audits razing and removing bid lettings originating from the District Real Estate Offices for compliance with contract special provisions and established procedures for acceptable bidding documents; counsels district representatives regarding errors, omissions, funding and financial compliance to established funding procedures; and advises and provides training sessions with contractor bidders regarding bid errors and irregularities.

CONTRACTS SPECIALIST - ADVANCED

Positions allocated to this classification level perform all of the duties identified at the Contracts Specialist - Senior level and in addition administer the most complex contract programs within state service. Positions allocated to this level differ from the Senior level in the scope, impact, and complexity of the contract programs administered, the complexity of the program knowledge required, the number and variety of programs administered, the fiscal impact of those programs, the complexity of the contract program guidelines, and the level of difficulty in interpreting those guidelines. Work is performed under general supervision. In order to be appropriately classified at this level, positions must spend the majority of their time on professional Contracts Specialist duties which are of similar scope, impact, and complexity as the representative positions identified at this classification level.

Representative Contract Specialist Positions

Department of Workforce Development, Division of Workforce Solutions Contracts Specialist - This position coordinates contract development and implementation for the Job Opportunities and Basic Skills (JOBS) program, Food Stamp Employment and Training (FSE&T), Waivers Savings projects, child care and other programs; designs and develops annual model contract language to be used by the Division of Economic Support and local agencies; drafts State/county and State/provider contract language for State and county agencies, representatives of provider agencies, and division representatives; negotiates the annual State/county contract and the annual State/provider grant agreement; coordinates the execution of contracts and contract addenda; develops and analyzes fiscal, policy and programmatic issues and prepares recommendations for division administrator in assigned program areas; prepares and monitors county and provider allocations, funding reimbursement and distribution methodologies; analyzes formulas, reimbursement and allocation methodologies and makes policy recommendations to the division administrator; prepares and reviews policy directives to implement policy decisions; and directs and analyzes quality improvement activities to achieve the division's/department's program priorities, identify standards of performs, and establish priorities to ensure intra-divisional coordination.

Department of Health and Family Services, Division of Support Living, PASARR Contracts Specialist - This position functions as the contract specialist for the Preadmission Screening and Annual Resident Review (PASARR) for the division and department. PASARR is a program functioning under Federal and State laws which affect persons who have a mental illness who are seeking admission to or are current residents of a nursing facility. This position drafts

state/provider contract language; provides expertise and consultation on the PASARR request for bid, contract, and related matters; monitors and ensures contractors are meeting the contract terms; resolves complaints regarding contractor performance; analyzes State and Federal legislation pertaining to PASARR; and functions as the policy analyst for PASARR.

Department of Transportation Consultant Services Contracts Specialist - This position administers the Division of Transportation Districts annual multi-million dollar consultant services program for a complex highway district with significant volume and dollar value of change orders; plans and evaluates the district's consultant engineering services needs identification, related budget management, and delivery methodology; functions as the district's technical advisor guides the coordination of consultant negotiation and selection activities to meet the district's consultant contract objectives; directs consultant selection teams for all design and construction contracts; develops rating and evaluation systems for consultant interviews; develops and monitors process to rank, prioritize, and control the selection of consultant contracts; trains engineering and contracting staff in the consultant contracting process; guides project managers in preparing consultant contract cost estimates; directs the review and analysis leading to acceptance or denial of contracts and contract amendments executed with consultants, ensuring compliance with applicable state statutes, federal policies and departmental procedures reviews and revises Chapter 8 FDM procedures; reviews the most complex contracts which includes those with multiple sub-consultants, complex fee and sub-fee computations, and fiscally phased contracts; directs the evaluation of contract components including special provisions, scope of services, and basis of payment; coordinates contract change order proposals between consultants, sub-consultants and the districts; train and assist other districts in setting up newly formed consultant services units; develop and update the Consultant Services Website.

III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV. ADMINISTRATIVE INFORMATION

This classification series was created as a result of the Contracts Survey which was implemented effective May 11, 1997 and was announced in Bulletin CC/SC-66. This classification specification was modified effective January 14, 2001 and was announced in Bulletin CLR/SC-125 to move the DOT Consultant Services Contracts Specialist position from the Senior to the Advanced level.

This classification series was collapsed and created effective May 18, 2003 and announced in Bulletin MRS-SC-158 as a result of the WPEC Broadbanding and Class Collapsing Study.

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