



**CONTRACT SPECIALIST I
CONTRACT SPECIALIST II
CONTRACT SPECIALIST III**

JC: UF221, UF222, UF223

PB: 02, 03, 05

FLSA: Non-Exempt, Exempt, Exempt

PC: 753, 754, 881

BU: 91 (NR)

Created: January 1999

Revised: September 22, 2006

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

Develops and administers engineering, construction, and equipment procurement contracts, services, leases and maintenance agreements; advertises invitation to bid and request for proposals; reviews and evaluates bids and proposals; ensures compliance with District policies and procedures; public contract code, and federal acquisition regulations; and performs related duties as assigned.

CLASS CHARACTERISTICS

This class series provides technical support to all District's departments in the areas of specifications and contract document preparation, award and execution of contracts/agreements and in contract administration after award. While some of the work is related to engineering, construction and procurement contracts, necessitating familiarity with engineering concepts and terminology, incumbents also administer professional and technical services, leases, maintenance and other long-term contracts/agreements. The Contract Specialist I, II, and III are distinguished from Principal Contract Specialist in that the latter performs the most complex duties assigned to the series or is responsible for participating in supervising, assigning and reviewing the work of subordinate or contract staff.

REPORTS TO

This position reports to Manager of Contract Administration.

Contract Specialist I - This is the entry level class in the Contract Specialist series. Since this class is typically used as a training class, employees may have limited related work experience.

Contract Specialist II - This is the journey level class within the Contract Specialist series. This class recognizes positions that require limited time on the job before an incumbent is capable of functioning at the full journey level. Positions at this level are initially expected to perform under immediate supervision, progressing to general supervision as knowledge of operating procedures is gained. Positions in this class are flexibly staffed and are normally filled by advancement from the I level, or when filled from the outside, have prior related-work experience.

Contract Specialist III - This is the advanced journey level class within the Contract Specialist series. Employees at this level are distinguished from other levels within this classification by the performance of the full range of duties as assigned. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the

II level, or when filled from the outside, have prior related-work experience. This class is distinguished from the Principal Contract Specialist in that the latter possesses a specialized technical or functional expertise within the area of assignment or may exercise lead supervision over assigned lower level staff.

EXAMPLES OF DUTIES – *Duties may include, but are not limited to, the following:*

1. Prepares and administers engineering, construction and equipment-procurement contracts, services, lease and maintenance agreements, work directives, and task orders; advertises invitation to bid and requests for proposals, coordinates the award and execution of contracts/agreements, non-competitive procurements and emergency contracts/procurements; plans and coordinates procurement activities within the scope of contracting responsibilities; prepares and edits work products for completeness and accuracy.
2. Schedules, coordinates and conducts pre-bid/pre-proposal meetings and site visits; prepares and distributes records of pre-bid/pre-proposal conferences to interested parties; attends bid openings and prepares bid tabulations; coordinates resolution of protests, claims and close-outs activities.
3. Meets with department personnel regarding solicitation documents, plans, and specifications, development of invitation to bid and requests for proposals and required source selection plans, bidders/proposers mailing lists, DBE, goals, and related solicitation or contract issues; coordinates and incorporates comments/revisions from legal and other departments into solicitation and contract documents.
4. Assists in negotiating contract terms and conditions; coordinates the review and approval process; reviews contractor progress to determine status of performance; administers, coordinates and processes change orders.
5. Reviews and evaluates bids and proposals; composes and prepares contract award and execution documentation such as bid/proposal evaluation sheets, procurement summary documentation, single bid memorandum, non-competitive award justification, cost and price analysis documentation, pre and post-negotiation memoranda, summary memoranda for proposers' oral interviews, technical evaluation of price proposals and related documents.
6. Coordinates the activities of the Procurement Department with other departments; follows-up on status of work sent to other departments; confers with management staff on contract issues as needed.
7. Attends and participates in management, project review and related committees or meetings; prepares materials and participates in presentations.

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8. Responds to requests for information on contracts from consultants, contractors, vendors, external customers, other departments and the general public.
9. Prepares, compiles and distributes a variety of reports including contract status, weekly summaries and related documents; generates and updates electronic contract database on all work performed.
10. Coordinates resolution of protests, claims, disputes and related issues; ensures that all responses comply with District standards and guidelines.
11. Prepares and maintains logs, records and files on all contracts and projects; edits and reviews the conformance of work prepared by staff.
12. Advises other District departments' staff on procurement methods, procedures, and rationale; recommends contract solutions.
13. Maintains business relationships with service providers to facilitate new and continuing contracts and agreements.
14. Assists in the development of standards for procurement or contract administration activities; maintains and monitors compliance with established standards.

QUALIFICATIONS

Contract Specialist I

Knowledge of:

- Basic principles of contract preparation
- Basic methods and techniques of contract negotiation
- General procurement practices and regulations
- Principles and procedures of record keeping
- Principles of basic report preparation
- Current office procedures, methods and equipment including computers
- Related Federal, State and local codes, laws and regulations

Skill/ Ability to:

- Prepare and maintain contracts, specifications and service agreements
- Conduct pre-bid meetings and site visits
- Negotiate contract terms
- Respond to requests for information from vendors, external customers and other departments
- Attend and participate in a variety of meetings and project reviews
- Prepare clear and concise reports
- Maintain accurate contract files
- Operate office equipment including computers and supporting word processing and spreadsheet applications
- Understand and follow oral and written instructions
- Communicate clearly and concisely, both orally and in writing
- Establish and maintain effective working relationships with those contacted in the course of work

MINIMUM QUALIFICATIONS

Education:

A Bachelor's degree in public administration, business administration, economics, engineering or a closely related field from an accredited college or university.

Other Requirements:

Must possess a valid California driver's license and have a satisfactory driving record.

Substitution:

Professional experience such as participating in preparation and administration of engineering construction contracts, service agreements, work directives and task orders; participating in procurement activities related to invitation to bid, request for proposals, review and evaluation of bids and proposals, award and execution of contracts and agreements, non-competitive procurements and emergency procurements; and participating in the coordination of other procurement activities within the scope of contract administration may be substituted for the education on a year-for-year basis. A Bachelor's degree is preferred.

Contract Specialist II

In addition to the qualifications for Contract Specialist I:

Knowledge of:

- Principles and practices of budget administration
- Principles and practices of procurement
- Basic engineering terminology and practices
- Principles and practices of contract preparation and administration
- Principles and techniques of contract negotiation
- Rules and regulations governing public contracting

Skill/Ability in:

- Preparing and maintaining contracts, specifications and service agreements
- Coordinating structured bidding activities
- Assisting in contract negotiations
- Interpreting technical plans and specifications
- Developing contract specifications and scope of work

MINIMUM QUALIFICATIONS

Education:

A Bachelor's degree in public administration, business administration, economics, engineering or a closely related field from an accredited college or university.

Experience:

Two (2) years of (full-time equivalent) verifiable business or contract administration experience.

Other Requirements:

Must possess a valid California driver's license and have a satisfactory driving record.

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Substitution:

Additional experience as outlined above may be substituted for the education on a year-for year basis. A Bachelor's degree is preferred.

Contract Specialist III

In addition to the qualifications for Contract Specialist II:

Knowledge of:

- Advanced mathematical skills
- Methods and techniques of developing procurement and contract standards
- District and mandated procurement principles, practices and standards
- Principles and practices of contract administration

Skill/Ability in:

- Performing a variety of contract administration duties
- Researching and analyzing contract terms and conditions
- Researching and analyzing procurement laws and regulations
- Working independently in the absence of supervision

MINIMUM QUALIFICATIONS

Education:

A Bachelor's degree in public administration, business administration, economics, engineering or a closely related field from an accredited college or university.

Experience:

Three (3) years of (full-time equivalent) verifiable professional contract or business administration experience.

Other Requirements:

Must possess a valid California driver's license and have a satisfactory driving record.

Substitution:

Additional professional experience as outlined above may be substituted for the education on a year-for-year basis. A Bachelor's degree is preferred.

WORKING CONDITIONS

Environmental Conditions:

Office environment; travel from site to site; exposure to computer screens.

Physical Conditions:

May require maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time.

BART EEO-1 Job Group: 3500 - Professionals
Census Code: 0530 - Purchasing Agents
Safety Sensitive: No