



Unclassified Professional Staff Financial and Contract Specialist Position Description

Initial
Date:

Revised
Date:

Purpose of the Position Description

- To record the essential functions of the position
- To record special requirements
- To record required knowledge and skills to perform the duties of the position
- To record special working conditions
- To aid in recruitment and selection
- To establish Management's expectations
- To provide a base for managing performance

Position Status

Incumbent's Name: _____
Position Title: Financial and Contract Specialist
Position Number: _____
Department/Division: The Research Institute
Type of Appointment: 12 mo. 9 mo. _____ Other _____
Contract Period: _____ to _____
Supervisor: Robyn Lopez Melton

Program Information

- A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.

The Research Institute (TRI) houses four Centers focused on informing and facilitating change in educational and human service systems to improve the quality of life for all individuals. Funded through external grants and contracts, the Centers conduct programs of research, develop evidence-based interventions that are provided through technical assistance and professional development, and increase system capacity to effect change. TRI was established in 1961 at WOU and has research partnerships throughout Oregon and the nation.

TRI is committed to promoting and supporting an environment which values and affirms equal opportunity, diversity, and inclusive practices. TRI is committed to creating a safe environment to have dialogue with our co-workers, partners, and those who receive our services about how to best address the implicit bias that exists.

B. Describe the purpose of this position and how it functions within this program.

Financial and Contract Specialist participates as a member of a collaborative team working on federal, state, and local projects within the TRI Center on Early Learning and Youth Development (CELYD). This position assists with financial oversight and contract implementation for existing programs in CELYD. This position cultivates equitable practices across all aspects of position duties.

Position Information and Qualifications
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A. Description of Duties/Responsibilities:

The essential functions of this position include, but are not limited to, the following fundamental duties and may change as needed:

% of Time	EF	Duties
50%	*	Assist Center Director to monitor financial activity. <ul style="list-style-type: none"> • Prepare financial statements, and other needed financial reports • Prepare and adjust project budgets • Create invoices to send to funders • Work with WOU Business Services and Sponsored Project Office on
10%	*	Assist with the development and processing of sub-award contracts and personal services contracts and working closely with the TRI Business Office, WOU Business Office and WOU Sponsored Projects Office.
20%	*	Assist in to processing project invoices, reimbursements, travel reimbursements, and salary and FTE adjustments and effort certifications.
3%	*	Participate in project related meetings.
5%	*	Assist with proposal budget preparation in collaboration with WOU Sponsored Projects Office.
5%		Gain and maintain a working knowledge of Oregon's early learning system and initiatives and applying learned skills to interrupt systemic oppression
5%	*	Work with WOU Sponsored Project Office to ensure grant compliance and maintain accurate documentation for financial compliance.
1%	*	Maintain project computer inventory and place computer orders with UCS.
1%		Perform special projects and related duties as assigned.
		Other duties as assigned

B. Required Qualifications:

List any certificates, licenses, academic degrees, or experience **required** to perform the duties of this position. Indicate if a combination of education and experience is acceptable.

- A. Bachelor's degree and/or specialized education, training/certification in accounting, financial management, business administration, or related subject or an equivalent combination of experience and education
- B. Minimum of three (3) years of experience in accounting and/or financial management which included budget development and monitoring and preparing fiscal reports.
- C. Strong analytical, organizational, and oral/written communication skills
- D. Attention to detail
- E. Demonstrated knowledge in standard computer applications (Microsoft Office Suite)
- F. Excellent interpersonal skills and a demonstrated passion for customer service
- G. Ability to work harmoniously as a team player
- H. Ability to be self-directed

C. Preferred Qualifications:

Describe preferred education, experience, skills, licenses, certificates, and other qualification for this position.

- A. Grants financial management and compliance experience, including expertise in budget development, financial statements, contract and sub-awards, compliance and policies
- B. Certificate and/or specialized training in grants financial management or project management
- C. Experience working with Banner FIS/SIS
- D. Language proficiency in Spanish, Russian, Vietnamese or Chinese

D. Knowledge Areas:

List the major areas of knowledge that are **preferred** to perform the duties of this position.

- A. Accounting principles
- B. Microsoft Office (Excel)
- C. Banner FIS/SIS
- D. OMB policies and procedures
- E. State policies and procedures
- F. University policies and procedures including:
 - Human Resource policies and procedures, including hiring practices
 - Sub-award and Personal Services Contracts policy and procedures
 - Payroll policy and procedures

E. Budget Authority: N/A

F. Supervisory Authority: N/A

G. Positions supervised: N/A

H. Decision-Making Authority: N/A

I. Additional Information:

All TRI salaried employees are considered exempt from overtime.

All TRI salaried employees begin new contracts on July 1 of each year; this position will likely be renewed at that time.

This is a grant funded position.

This position is currently eligible for telework with limited required time on the WOU campus.

TRI Mission:

The Research Institute (TRI) at Western Oregon University improves the quality of life for individuals by facilitating positive change in education, health, and human services systems.

WOU Diversity and Respect Values:

Equity and inclusion; a fundamental basis in human diversity; appreciation for the complexity of the world; strength drawn from our variety of backgrounds, abilities, cultural experiences, identities, knowledge domains and means of expression.

Employee

Date

Supervisor

Date

Reviewed by TRI Director:

Signature

Date

No Revisions/Reviewed:

Initials

Date

Human Resources Use Only:

Date Received: _____ HRS Signature: _____

FLSA Status: ___ Exempt from overtime ___ Eligible for overtime
 ___ Executive
 ___ Administrative
 ___ Professional

Comment: _____

Western Oregon University reserves the right to change this position description at any time.