

## Position Description - Unclassified

### Position Status:

Position Title		Position Number
Contract and Grant Financial Specialist		E99916
Appointment (9mos. / 12 mos. / Other)	Contract Period (from / to)	FLSA
12 mos.	07/01/21 – 06/30/22	Exempt
Position Type		Regular/Short-Term
Full-Time		Regular
Work Location		Department/Division
Monmouth		Sponsored Projects Office
Reports to		Reports to Position Number
Associate Director of Award Management and Post Award Services		E99987
Incumbent		University ID #
TBD		

### Program Information:

<p>A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.</p> <p>Western Oregon University is a public, regional, comprehensive university. The Sponsored Projects Office (SPO) supports the scholarship, research, teaching, and programmatic missions of the University by providing guidance and oversight to faculty and staff at every stage of the external funding process, including identifying funding opportunities, proposal development and submission, post-award management, and compliance. The SPO also establishes WOU policies related to sponsored project funding, is the authorized representative on grant submissions, and serves as the formal institutional liaison with external sponsors. Western Oregon University is committed to creating an environment that fosters diversity, equity, and inclusion, actively embraces social justice, and works to ensure that people of all backgrounds feel welcome, safe, and included.</p> <p>Women, members of the LGBTQIA+ community, and people of color may be less likely to apply for jobs unless they meet every one of the qualifications listed. We are most interested in finding the best fit for the job, and that candidate may be one who comes from a less traditional background. We would encourage you to apply, even if you don't meet every one of our qualifications listed.</p>
<p>B. Describe the purpose of this position and how it functions within this program.</p> <p>The Financial and Contract Specialist participates as a member of a collaborative team working to assist with the support of awards on campus. This position assists with the Pre-award phase of an award through the transition to an active award. This position assists with financial oversight and contract implementation for awards that are received by WOU. They are responsible for assisting with budgets, invoicing, and other financial pieces in the Sponsored Projects office. This position is located in a centralized unit on campus and collaborates with people across college, divisions, and</p>

departments. This position collaborates with diverse partners across WOU and has the opportunity to promote a diversity, equity, and inclusive environment on campus.

### Position Information and Qualifications:

A. Description of Duties/Responsibilities – List the major duties assigned to the position. Note percentage of time each listed duty is performed to total 100%.

Percent of time	Duties
40%	Budgets <ul style="list-style-type: none"> <li>● Reviews the proposal and award budgets prior to submission and assists in identifying any parts that may need to be changed to bring into compliance with funder and university policies.</li> <li>● Once funded, transitions the budget to Banner with assistance from the SPO Grants Accountant.</li> <li>● Assists with setting up and managing Subaward Budgets</li> </ul>
15%	<ul style="list-style-type: none"> <li>● Tracks and guides award through the signature process once awarded and communicates with the Post- and Pre-award teams the award status during the process.</li> </ul>
20%	Invoicing: <ul style="list-style-type: none"> <li>● Creates invoices to be sent to sponsors.</li> <li>● Collects and tracks receipt of funding and receivables.</li> <li>● Once the final invoice is collected, reconciles and closes the account.</li> </ul>
5%	Assists with compiling quarterly indirect disbursement and reconciles to the main account.
2%	Participates in project related meetings.
10%	Participates in account close-out including creating final reports and final invoices.
5%	Closes inactive indices and identifies indices that need to be closed.
2%	Provides customer service and assistance to principal investigators and project directors; interprets regulations and guidelines of program funding for grants and contracts
1%	Performs special projects and related 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.

- 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
- Strong analytical, organizational, and oral/written communication skills
- Attention to detail
- Demonstrated knowledge in standard computer applications (Microsoft Office Suite)
- Excellent interpersonal skills and a demonstrated passion for customer service
- Ability to work harmoniously as a team player
- Ability to be self-directed

### C. Preferred Qualifications

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

- Grants financial management and compliance experience, including expertise in budget development, financial statements, contract and sub-awards, compliance and policies
- Demonstrated experience working with and supporting the success of people who have diverse backgrounds, cultures, and languages
- Demonstrated experience coordinating collaborative projects and efforts among diverse stakeholders.
- Certificate and/or specialized training in grants financial management or project management
- Experience working with Banner FIS/SIS

### D. Knowledge Areas

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

#### Key Competencies and Skills

- Strong computer skills including word processing, database management, and spreadsheet skills required
- Excellent verbal and written communication skills required
- Attention to detail required
- Ability to be flexible and adaptable required
- Knowledge of general accounting standards and auditing required
- Strong organizational skills required
- Strong financial and analytic skills required
- Ability to research issues and propose solutions to problems required
- Demonstrated initiative in improving processes and enhancing systems required
- Ability to exercise sound judgment, discretion and tact required
- Familiarity with federal and non-federal grant and contract policies required
- Time management skills and the ability to handle multiple, concurrent tasks within deadlines required
- Ability to work with individuals from across the university required



- Knowledge of Federal and Non-federal regulations (e.g., Uniform Guidance, State of Oregon Regulations) preferred Ability to communicate processes and procedures required of PIs in grant administration and management preferred
- Ability to manage multiple projects, to anticipate information needs of faculty and staff related to grants, and to respond to new situations preferred

**Budget Authority:**

Indicate the level of the position’s responsibility for the development, control, and monitoring of budget. Indicate the size of the budget. Check all that apply.

x	Develops, monitors*, and controls* <i>*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level</i>	Will develop budgets but not input into banner
x	Delegated authority to monitor budget	Will need access to view in order to invoice
	Limited approval authority for purchase	
	Purchase only with higher level approval	

**Supervisory Authority:**

If this position has the authority to act or effectively recommend action affecting employees in the following areas, check all that apply.

<input type="checkbox"/>	Hire	<input type="checkbox"/>	Assign Work
<input type="checkbox"/>	Transfer	<input type="checkbox"/>	Recommend salary adjustments
<input type="checkbox"/>	Discipline	<input type="checkbox"/>	Approve requests (i.e. leave)
<input type="checkbox"/>	Dismiss	<input type="checkbox"/>	Respond to complaints/grievances
<input type="checkbox"/>	Layoff	<input type="checkbox"/>	Conduct performance assessments
<input type="checkbox"/>	Promote	<input type="checkbox"/>	Give Direction

**Positions Supervised:**

Type	# of Employees	Total FTE
Teaching faculty	0	0
Classified staff	0	0
Unclassified staff	0	0
Student Employees (average per term)	0	0
Other (specify)	0	0

**Decision Making Authority:**

Describe the breadth and scope of decision-making authority and discretion the position has to formulate, implement, evaluate, approve and/or modify department and/or university policy, procedures, and/or programs. Describe the type of review and/or approval required by a higher level.



N/A
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**Additional Information:**

List any additional information that would help describe the nature of the position.
N/A

**Acknowledgement:**

Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date
Appointing Authority	Appointing Authority Signature / Date

**HR USE ONLY:**

Received by		Date	
Position Class # (Ex. UF101)	Employee Class	Job Location	Appointment Percent
CUPA-HR# / Title	NOC Code	Category Code	SOC Code
Actions Taken			
	NBAPBUD / NBAPOSN		
	NBAJOBS		
	PEAFAC		
	Electronically Filed		