

Purpose and Instructions

Please complete the following form. Once the form is completed and signed, please return to Human Resources.

Purpose of the PD:

- 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 Title		Today's Date
Financial & Contract Specialist		11/18/24
Appointment (9mos. / 12 mos. / Other)	FLSA	
12 mos	Exempt	
Position Type	Work Location	
Full-Time	Remote/hybrid (in-person professional development)	
Department/Division	Position Number	
The Research Institute	E80001	
Reports to	Reports to Position Number	
Deputy Director of Operations	E99864	

SUMMARY

A brief summary of the position here.

The Research Institute (TRI) houses three 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. TRI is committed to creating an anti-racist workplace that is fully inclusive by disrupting systemic racism and dismantling barriers for people of color in the workplace.

Project Specialists participate as members of a collaborative team working on a variety of projects within TRI.

Financial & Contract Specialist

The Financial & Contract Specialist participates as a member of a collaborative team working on federal, state, and local projects within the TRI. This position assists with post award financial oversight and contract implementation for existing programs in TRI. Major responsibilities include invoicing for grants, pay adjustments, budget management, and contract preparation. This position cultivates equitable practices across all aspects of position duties.

TRI staff are expected to engage in continual learning in anti-racism, equity, diversity, inclusion and outreach in order to cultivate equitable practices across all aspects of position duties and participate and engage in efforts to further develop and implement the center, projects and university's equity work and goals.



JOB DESCRIPTION

ESSENTIAL DUTIES AND RESPONSIBILITIES

This description covers the most significant essential and auxiliary duties performed by this position for illustration purposes, and does not include other work, which may be similar, related to, or a logical assignment for the position. The job description does NOT constitute an employment agreement between the university and employee and is subject to change by the university as the organizational needs and requirements of the job change.

JOB DUTIES		
JOB DUTIES (Please ensure the total of “% of Time” equals 100%)		
% of Time	Duties / Responsibilities	Essential or Incidental
60%	Work with Directors to ensure program/grant financial compliance across TRI projects. (Approximately \$18 million biannually.) <ul style="list-style-type: none"> ● Prepare financial statements, and other needed financial reports in a timely and accurate manner ● Prepare, monitor and adjust project budgets and assist directors in understanding and monitoring expenditures ● Prepare program invoices to send to funders ● Monitor budgets and expenditures to ensure spending is in compliance with grant, federal, state and university requirements and policies ● Maintain all financial records 	Essential
10%	Assist with the development and processing of sub-award contracts and personal services contracts <ul style="list-style-type: none"> ● Work closely with the Business Office, Sponsored Projects Office, Legal Counsel and other campus departments to ensure efficient processing of grants and contracts. ● Communicate with vendors and Directors about status of contracts ● Maintain all records and ensure timely and accurate invoicing, payment and communication 	Essential



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20%	Other TRI financial duties to include: <ul style="list-style-type: none"> Review salary records for project staff. Prepare and process pay adjusts, making adjustments to salary and FTE. Monitor that adjustments are processed thoroughly and inform Directors of any errors or needed changes in a timely manner. Process, distribute, collect and ensure accuracy of quarterly Effort Certifications. Process invoices, Journal vouchers, credit card reconciliations and other financial processes as assigned. 	Essential
5%	Assist with proposal budget preparation	Essential
5%	Gain and maintain a working knowledge of Oregon’s early learning system and initiatives and applying learned skills to interrupt systemic oppression.	Essential
5%	Other duties as assigned	Incidental

QUALIFICATIONS

Ability to perform essential job duties with or without reasonable accommodation and without posing a direct threat to the safety or health of employees or others. To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Required Qualifications

- 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
- Commitment to actively participate in and support TRI’s anti-racism goals and practices

Preferred Qualifications

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

EDUCATION and/or EXPERIENCE



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Any combination of experience and training that would provide the required knowledge and abilities is appropriate. A representative way to obtain the required knowledge and abilities would be:

Education			
Type of Education	Required	Preferred	Specific field, training or degree
High School Diploma or equivalent (GED)	<input type="checkbox"/>	<input type="checkbox"/>	
Associate degree (A.S., A.A.) or two-year technical certificate	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
Bachelor's degree	<input checked="" type="checkbox"/>	<input type="checkbox"/>	And/or specialized education, training/certification in accounting, financial management, business administration, grants management or related subject or an equivalent combination of experience and education
Master's degree	<input type="checkbox"/>	<input type="checkbox"/>	
Doctoral degree or equivalent (Ph.D., J.D., Ed.D.)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
Other (explain)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.

Experience			Type of Experience
Years of Experience	Required	Preferred	
<input type="checkbox"/> No experience			
1-2 years	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Grants management experience
3-5 years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Accounting and/or financial management which included budget development and monitoring and preparing fiscal reports.
6-8 years	<input type="checkbox"/>	<input type="checkbox"/>	Professional work experience in office setting
9-10 years	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
10+ years	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.

CERTIFICATES, LICENSES, REGISTRATIONS		
(Select all that apply)	Required	Preferred
None		
Driver's license	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Eligibility for Professional license, registration or certification	<input type="checkbox"/>	<input type="checkbox"/>
Professional license	<input type="checkbox"/>	<input type="checkbox"/>
Registration	<input type="checkbox"/>	<input type="checkbox"/>
Certification	<input type="checkbox"/>	<input type="checkbox"/>
Please specify required professional license(s), registration(s), and or certification(s), if applicable:		



JOB DESCRIPTION

Click or tap here to enter text.

SUPERVISION

The practice of oversight given to others. Supervision typically includes directing work activities, counseling, disciplinary actions, hiring, firing, salary actions, performance appraisal, training, etc.

Level 1	Positions at this level are not responsible for any supervisory functions or responsibilities but may occasionally be asked to orient and/or train new employees.	<input checked="" type="checkbox"/>
Level 2	Lead Capacity: Positions at this level are responsible for providing leadership and instruction in daily work or special project direction that is provided to personnel in similar job functions at comparable or subordinate levels. This work is limited to individuals in same work unit. Positions are not responsible for hiring, firing, disciplinary actions, etc.*	<input type="checkbox"/>
Level 3	Positions at this level are normally responsible for some supervisory responsibilities, including providing daily work direction, making recommendations regarding hiring, disciplining, terminating employees, making pay adjustments, and/or making employee job/assignment changes. These jobs do not make independent employment related decisions.	<input type="checkbox"/>
Level 4	Positions at this level are normally responsible for a full range of supervisory responsibilities, including providing daily work direction, hire, discipline and terminate employees, make pay adjustments, communicate performance appraisals, approve absences, and/or make employee job/assignment changes subject to Department Head approval. This is the first full level of supervisory responsibility. Jobs at this level and higher are typically exempt.	<input type="checkbox"/>
Level 5	Positions at this level are normally responsible for a full range of supervisory responsibilities, including providing daily work direction, authority to hire, discipline and terminate employees, make pay adjustments, communicate performance appraisals, approve absences, and/or make employee job/assignment changes. Supervision will typically include both exempt and nonexempt positions which may include other supervisors.	<input type="checkbox"/>
Level 6	Positions at this level are normally responsible for full managerial responsibility including providing direction to other supervisors/managers regarding the supervision of their staff. Supervisory span will include direct and indirect reports, may cover multiple departments.	<input type="checkbox"/>
Level 7	The positions at this level are normally responsible for the overall management of the college, including providing direction to senior managers regarding the supervision of their staff. Final managerial authority and responsibility rests at this level.	<input type="checkbox"/>

If supervisor position, please list direct reports to employee:

Employee(s)	Job Title

*A **lead role** typically will provide oversight of people, projects, or functions. Whereas a supervisor will hire, fire and have performance appraisal responsibilities. A lead may contribute to these processes but typically does not have final decision-making authority in employment decisions.



JOB DESCRIPTION

DECISION MAKING & FISCAL RESPONSIBILITY

For full definitions of terms in the drop down lists please see the PD user guides.	
Scope of Decisions Made:	Policy Driven
Impact of Decision Made:	Position
Autonomy and Discretion:	Independent Work, Results Defined
Fiscal Authority:	None
Fiscal Responsibilities:	Administration/Oversight
Operating Budget (\$):	\$ Click or tap here to enter text.
Grant funding (\$):	\$ Click or tap here to enter text.
Number of Grants:	Click or tap here to enter text.
Foundation Funding (\$):	\$ Click or tap here to enter text.
Number of Foundation Funds:	Click or tap here to enter text.
Agency Funding (\$):	\$ Click or tap here to enter text.

WORKING CONDITIONS

Typical Work Functions* (check all that apply)	<input type="checkbox"/> Balancing	<input type="checkbox"/> Carrying
	<input type="checkbox"/> Climbing	<input type="checkbox"/> Crawling
	<input type="checkbox"/> Crouching/ Stooping	<input type="checkbox"/> Driving
	<input type="checkbox"/> Feeling/Handling	<input checked="" type="checkbox"/> Keyboarding/Computer Use
	<input type="checkbox"/> Personal Protective Equipment	<input type="checkbox"/> Pulling/Pushing
	<input type="checkbox"/> Reaching	<input type="checkbox"/> Regular interaction with customers
	<input type="checkbox"/> Repetitive movement	<input checked="" type="checkbox"/> Sitting
	<input checked="" type="checkbox"/> Speaking	<input type="checkbox"/> Specific Work Schedule
	<input type="checkbox"/> Squatting	<input checked="" type="checkbox"/> Standing
	<input checked="" type="checkbox"/> Telephone Use	<input type="checkbox"/> Twisting/Bending
	<input checked="" type="checkbox"/> Walking/Running	<input checked="" type="checkbox"/> Writing

Typical Working Environment and Hazards* (check all that apply)	<input checked="" type="checkbox"/> Normal office environment	<input type="checkbox"/> Animals/Wildlife
	<input type="checkbox"/> Chemicals	<input type="checkbox"/> Confined Spaces
	<input type="checkbox"/> Darkness/Poor Lighting	<input type="checkbox"/> Dust/Fumes
	<input type="checkbox"/> Electrical Hazards	<input type="checkbox"/> Explosives
	<input type="checkbox"/> Fire Hazards	<input type="checkbox"/> Heights
	<input type="checkbox"/> Human-Source Material (e.g., blood)	<input type="checkbox"/> Indoor Temp Extremes (Heat/Cold)
	<input type="checkbox"/> Moving machinery/Heavy Equipment	<input type="checkbox"/> Near-Continuous Use of Video Display
	<input checked="" type="checkbox"/> Noise	<input type="checkbox"/> Pathogens





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<input type="checkbox"/> Potential Combative Work Environment <input type="checkbox"/> Traffic <input type="checkbox"/> Weather Extremes	<input type="checkbox"/> Radiation <input type="checkbox"/> Vibration
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Lifting Demands*	Up to 10 pounds
Additional Physical Demands or Work Conditions:	Click or tap here to enter text.
Frequency of Travel*	Up to 10%
Work Schedule (if not typical or specified)	Click or tap here to enter text.

ADDITIONAL REQUIREMENTS

Background/Education Check: A criminal background check will be completed as a condition of employment. Education checks are processed for positions requiring a formal degree as a minimum requirement. Reference checks will be conducted.

Equal Employment Opportunity: Western Oregon University is an equal opportunity employer that is committed to diversity, equity and inclusion in the workplace. We celebrate our inclusive work environment and encourage people of all backgrounds and perspectives to apply.

We embrace our differences and know that our diverse team is a strength that drives our success.

Accommodation Requests: Western Oregon University is committed to developing a barrier-free recruitment process and work environment. If you require any accommodations, please email us at [employment\[at\]wou.edu](mailto:employment[at]wou.edu) and we will work with you to meet your accessibility needs.

Acknowledgement:	
Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date





JOB DESCRIPTION

Appointing Authority	Appointing Authority Signature / Date

HR USE ONLY:

Received by:	Date		
Position Class #:	Employee Class	Job Location	Appointment Percent
CUPA-HR#/Title	NOC Code	Category Code	SOC Code
Actions Taken			
<input type="checkbox"/> NBAPBUD/NBAPOSN <input type="checkbox"/> NBAJOBS <input type="checkbox"/> PEAFACT <input type="checkbox"/> Electronically Filed			

NOTES: