**Job Template: Grants and Contracts Assistant**

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<td>FLSA Status: E</td>
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**P1: Level Standards**

**GENERAL ROLE**

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence.

**Incumbents:**
- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Assignments tend to be reoccurring and work outputs generally are delivered in a prescribed form/format.
- May alter the order in which work or a procedure is performed to improve efficiency and effectiveness.

**INDEPENDENCE AND DECISION-MAKING**

- **Supervision Received**
  - Works under supervision.
  - Progress and outcomes are reviewed for consistency with instructions and established procedures.

- **Context of Decisions**
  - Determines the process of how work is to be done based on precedent, practice, and existing policy at the unit/office level.

- **Job Controls**
  - Receives some instructions with respect to details of most work assignments.

**COMPLEXITY AND PROBLEM SOLVING**

- **Course of Resolution**
  - Resolutions are typically generated by utilizing existing procedures or practice.
  - Typically, problems can be quickly and relatively easily resolved.
Job Template: Grants and Contracts Assistant

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→ Measure of Creativity
  • Tasks or activities are reoccurring with emphasis typically on precision and timeliness of execution.

COMMUNICATION EXPECTATIONS

→ Manner of Delivery and Content
  • Regularly provides information on finished materials to others.

SCOPE AND MEASURABLE EFFECT

  • Actions regularly affect an individual, item, event, or incident, etc.
  • Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
  • Incumbents indirectly promote the general welfare of students, faculty and staff, and safeguard the institution by playing an important role within a process.
Job Template: Grants and Contracts Assistant

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**GENERAL SUMMARY**

Performs pre- and post-awards administrative duties related to the management of research grants.

**REPORTING RELATIONSHIPS AND TEAM WORK**

Works under supervision of a supervisor or manager.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.

- Prepares faculty grant applications for submission, including drafting proposal documents, informing faculty of submission process, establishing a grant record, and drafting budgets.
- Monitors compliance with guidelines from awarding agencies and maintains familiarity with terms and conditions associated with grants and awards.
- Supports monitoring, tracking, and interpreting fiscal records for a portfolio of accounts including payroll records, purchasing, travel, and other disbursements to maintain compliance with grant policies.
- Communicates financial information regarding grant accounts to faculty members, including remaining balances, anticipated payroll expenses, and incoming funding.
- Analyzes and verifies transactions related to grants and contracts accounts such as invoices, travel, reimbursements, and requisitions.
- Maintains internal records of grant applications and information, including budget details, invoices, correspondences, submitted applications, budget justifications, etc.
- Meets with faculty to explain services, communicate financial information, and assist with accounts as needed.
- Maintains internal grant management database with grant submissions and related account information.
- Corresponds with administrators from other institutions and federal sponsor contacts.
- Performs related work as required.
**Job Template: Grants and Contracts Assistant**

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**MINIMUM QUALIFICATIONS**

- Bachelor’s degree in related field.
- Up to one year of related experience.

**COMPETENCIES**

**Knowledge of:**

- Financial regulations for federal and University funds
- Grant and University policies
- Microsoft Office and related software applications

**Skill in:**

- Planning and organization
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

**Ability to:**

- Meet established deadlines
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Run ad hoc reports on grant expenditures
- Maintain the confidentiality of information and professional boundaries
- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management
Job Template: Grants and Contracts Development Officer

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P3: Level Standards

GENERAL ROLE

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence. Positions at this level may supervise student or support employees.

Incumbents:

- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

INDEPENDENCE AND DECISION-MAKING

→ Supervision Received
  - Works under limited supervision.

→ Context of Decisions
  - Utilizes general departmental guidelines to develop resolutions outside the standard practice.

→ Job Controls
  - Possesses considerable freedom from technical and administrative oversight while the work is in progress.
  - Defines standard work tasks within departmental policies, practices, and procedures to achieve outcomes.
  - Serves as the advanced resource to whom more junior employees go to for technical guidance.
**Job Template: Grants and Contracts Development Officer**

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**COMPLEXITY AND PROBLEM SOLVING**

→ **Range of issues**
  - Handles a variety of work situations that are cyclical in character, with occasionally complex situations.
  - Issues are regularly varied.
  - Problems tend to be technical or programmatic in nature.

→ **Course of Resolution**
  - Assesses a variety of situations, and develops resolutions through choosing among options based on past practice or experience.

→ **Measure of Creativity**
  - Issues are solvable through deep technical know-how and imaginative workarounds.
  - Most of the obstacles, issues, or concerns encountered require considering alternative practice or policy interpretation.

**COMMUNICATION EXPECTATIONS**

→ **Manner of Delivery and Content**
  - Regularly provides information on finished materials to others.

**SCOPE AND MEASURABLE EFFECT**

- Actions regularly affect an individual, item, event, or incident, etc.
- Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
- Incumbents have an indirect impact on a larger action or process, such as serving as a single component in an approval process, where the process is “owned” by a different work unit.
- May be designated to guide or organize the work of several employees within the unit.
**Job Template: Grants and Contracts Development Officer**

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</table>

**Job Template**

**GENERAL SUMMARY**

Assists in developing external funding sources to support new and existing programs in the department/school/division.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under limited supervision of a supervisor or manager.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

- Oversees and facilitates efforts to secure sponsored project funds, including development of proposals, fund-raising projects, and programs.
- Explores, researches, and identifies appropriate funding sources consistent with department/school/division mission and goals.
- Provides technical assistance in developing grant and contract proposals compatible with department/school/division interests.
- Interprets application guidelines and advises pertinent parties regarding compliance with federal, state, University, and other agency regulations as they pertain to allowable costs.
- Assesses the capability to successfully compete for external funding. Identifies expertise and essential support systems within the department/school/division to successfully carry out funded projects.
- Works with appropriate fiscal administrator to review fiscal aspects of proposal to ensure compliance with funding agency guidelines, including salary, fringe benefits, purchase of equipment, matching funds required, etc.
- Monitors funded programs.
- Performs related work as required.

**MINIMUM QUALIFICATIONS**

- Bachelor’s degree in related field.
- Three to four years of related experience.
**Job Template: Grants and Contracts Development Officer**

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**COMPETENCIES**

**Knowledge of:**
- Program and clientele served
- External funding sources and regulations
- Needs assessment, curriculum development, and evaluation methodology
- Microsoft Office and related software applications

**Skill in:**
- Planning and organization
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

**Ability to:**
- Meet established deadlines
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Maintain the confidentiality of information and professional boundaries
- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management
Job Template: Grants and Contracts Specialist

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P4: Level Standards

GENERAL ROLE

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence. Positions at this level may supervise student or support employees.

Incumbents:

- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

INDEPENDENCE AND DECISION-MAKING

➔ Supervision Received
  - Works under direction.

➔ Context of Decisions
  - Decisions should involve selecting an approach from among alternatives, timing when certain tasks should be performed, determining how to best use available resources, and other similar choices.
  - Decisions require more coordination and collaboration among different sources, taking into consideration the roles and impact on work outside the immediate organization.

➔ Job Controls
  - Has the latitude to make decisions on projects that they are accountable for delivering on.
  - Free to plan and carry out all phases of work assignments.
## Job Template: Grants and Contracts Specialist

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### COMPLEXITY AND PROBLEM SOLVING

**Range of issues**
- Assignments are defined as less reoccurring or cyclical tasks, and primarily consist of development or refinement of programmatic or administrative objectives.

**Course of Resolution**
- Resolution and project completion require substantial planning and scheduling within the department in order to obtain and align resources when and where needed.

**Measure of Creativity**
- Problems are not amenable to strict technical resolution, requiring innovative thinking.

### COMMUNICATION EXPECTATIONS

**Manner of Delivery and Content**
- Regularly provides information on finished materials to others.
- Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

### SCOPE AND MEASURABLE EFFECT

- Incumbents may supervise a small homogenous department, with proportionate responsibility to perform daily responsibilities similar to the work of subordinate staff.
- Actions typically affect an individual, item, event, or incident, etc.
- Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
- Incumbents are typically designated as a lead or frequently assigned project leadership roles within a specific administrative/programmatic function or specialty area.
Job Template: Grants and Contracts Specialist

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- Generally, have a more direct impact on a larger action or process, such as serving as an approver in a process, where the process is “owned” by a different work unit.
Job Template: Grants and Contracts Specialist

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Job Template

GENERAL SUMMARY

Provides day-to-day management and oversight of a high-volume of funded projects/grant accounts.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under direction of a supervisor or manager. Serves a lead worker to employees who perform similar functions.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.

- Provides technical assistance, training, and advice to faculty, University Administration, and other professional staff on the preparation and submission of grant proposals.
- Reviews fiscal aspects of grant proposals to ensure fiscal compliance with federal and state statutes, University policy, and sponsor agency guidelines and requirements.
- Recommends solutions, re-budgets, and negotiates changes when conflicts arise with contract provisions or grant requirements.
- Interprets and prepares budgets and financial reports and processes financial transactions. Maintains records and writes and submits monthly research and scholarship informational reports.
- Assists in obtaining approvals necessary for sponsored grants, contracts, subcontracts, and other agreements. Serves as liaison between University administration, faculty, and granting agencies.
- Participates in policy discussions and recommends policy or procedural changes as appropriate to improve efficiency and effectiveness.
- Administers and maintains an awarded contract in compliance with University policies and contracted statutes, regulations, and procedures.
- Analyzes and resolves a variety of technical grant, financial, and contract problems.
- Performs related work as required.
Job Template: Grants and Contracts Specialist

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**MINIMUM QUALIFICATIONS**

- Bachelor’s degree in related field.
- Four to five years of related experience.

**COMPETENCIES**

Knowledge of:

- Federal and state laws, regulatory requirements, and University policies governing the planning, application development, and management of research and program grants and contracts for universities
- University procedures and processes for grant applications
- Research administration
- Microsoft Office and related software applications

Skill in:

- Planning and organization
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

Ability to:

- Provide grant application technical assistance and training
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Interpret and communicate detailed grant program guidelines, policies, and procedures
- Write and interpret technical contract language
- Maintain the confidentiality of information and professional boundaries
- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management
M6: Level Standards

GENERAL ROLE

This level is accountable for providing management of a small- to moderate-sized office or department charged with providing a variety of cross-disciplinary services. Incumbents should generally have oversight of professional and non-professional staff, as well as business and/or administrative operations. Positions at this level do not exclusively serve as the supervisory level to only student employees.

Incumbents:

- Modify practices and procedures to improve efficiency and quality of services delivered by subordinate staff.
- Ensure policies and procedures are followed and functions are carried out efficiently and correctly.
- Are accountable for setting goals and objectives for staff members to achieve operational objectives and service standards.
- Distribute work and monitor workload among staff.
- Evaluate and monitor the accuracy, quality, quantity, and timeliness of services and activities.
- May develop/enhance processes and procedures to improve efficiency or effectiveness of services, as a means to fulfill departmental or office initiatives.

INDEPENDENCE AND DECISION-MAKING

→ Supervision Received
  - Works under direction.
  - Seeks approvals when significant changes to process steps are considered and additional resources for task completion are required.

→ Context of Decisions
  - Decisions are driven by departmental policy and procedures.
  - Understands the smallest details of an assigned area.

→ Job Controls
**Job Template: Grants and Contracts Manager**

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- Free to plan and carry out all phases of work assignments, including the oversight of staff.
- Has the latitude to make daily operational decisions.

**COMPLEXITY AND PROBLEM SOLVING**

*Range of issues*
- Issues are readily identified but cannot be understood and fixed in simple cause-effect terms.
- Variables affecting the problem are generally known.

*Course of Resolution*
- Utilizing an understanding of best practices and the way similar units run elsewhere, convincingly recommends, develops, and implements capital and process improvements to the area.

*Measure of Creativity*
- Problems require integrative solutions such as how technologies, processes, resources, and people all fit together.

**SCOPE AND MEASURABLE EFFECT**

- Serve as a manager of a moderate-sized department or office charged with carrying out cross-disciplinary tasks or functions.
- Actions regularly affect a department or an office-centric outcome with departmental impact.
- Actions generally have a direct impact on controlling such things as staff size and nature of work and scope of services.
- Actions may have high-risk compliance or safety implications.
- Performance results tend to relate to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.
Job Template: Grants and Contracts Manager

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**GENERAL SUMMARY**

Manages sponsored program grants and contracts to ensure requirements are met and are in compliance with university and sponsor rules/regulations. Provides day-to-day guidance and high-quality customer service to faculty, department administrators, and sponsors in managing the post-award technical and financial aspects of their sponsored programs. Facilitates teamwork with pre-award and departmental staff.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under direction of a manager. Manages professional and non-professional staff, as well as business and/or administrative operations of a moderate sized department of cross-disciplinary services.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

- Manages grant and contract award activities, including account set-up, compliance reviews, account reconciliation, expenditure reviews, financial reporting, and closeout.
- Oversees the work of assigned personnel, including assigning and reviewing work, providing guidance, and conducting performance evaluations.
- Serves as an expert resource to faculty, department support staff, direct reports, and others. Provides assistance with interpreting policies, award terms/conditions, regulations, and resolving complex issues related to grant and award proposals, submissions, guidelines, and other concerns.
- Serves as a member of the leadership team. Participates in establishing and updating office policies, procedures, processes, and initiatives.
- Works with auditors to respond to questions and findings regarding grants and contracts. Gathers and provides supporting reports/documentation to facilitate the reviews.
- Monitors compliance with grant, award, and sponsor guidelines, agreements, and policies.
- Serves as a liaison between departments and sponsoring agencies. Facilitates obtaining sponsor approvals.
Job Template: Grants and Contracts Manager

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<td>Job Level: 6</td>
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<td>FLSA Status: E</td>
<td>Job Code: B30003</td>
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- Keeps current with industry best practice, federal and state law, and sponsoring agencies’ policies as they pertain to sponsored program activity.
- Participates in national and local meetings, seminars, and workshops in the area of research.
- Performs related work as required.

MINIMUM QUALIFICATIONS

- Bachelor’s degree in related field.
- Six to seven years of related experience.

COMPETENCIES

Knowledge of:
- Federal regulations, sponsor guidelines, and the Federal Office of Management and Budget Uniform Guidance as it relates to sponsored program activities
- University policies and procedures related to and affecting sponsored program activities
- University financial systems
- Principles and practices of employee supervision
- Microsoft Office and related software applications

Skill in:
- Planning and organization
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

Ability to:
- Develop financial reports
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Test and verify data during software upgrades and implementation
- Maintain the confidentiality of information and professional boundaries
Job Template: Grants and Contracts Manager

<table>
<thead>
<tr>
<th>Occupational Group</th>
<th>Administrative Services</th>
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- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management