

To: Shelley Caskey, Human Resources Director

From: Ann Guevara, Human Resources Supervisor

RE: Grant Administrator Job Audit

Date: January 13, 2023

Background:

The Finance Director requested an audit for the Grant Administrator position held by Crystal Madrigal as part of the 2023 budget. The basis for the audit is the duties and responsibilities have increased in scope. The incumbent completed a Job Analysis Questionnaire (JAQ).

Changes to Position:

The Grant Administrator was a new 2020 budgeted position filled in 2021 by Crystal Madrigal to conduct research, identify grant funding opportunities, compose grant proposals, and provide technical support for City grant programs.

A compliance issue with a federal granting agency highlighted the risk and exposure to the organization and the need to manage the financial oversight and implement compliance and internal controls for all City grants. Crystal took on these higher-level responsibilities. In addition to financial oversight, Crystal's position works with executive level staff in granting agencies and is responsible for directing and redirecting personnel, including Department Directors, on grant applications and compliance.

As a direct result of Crystal's efforts, the City's grant workload increased, and an additional grant position was budgeted in 2022. Crystal maintained the more complex job duties and assumed a lead role in training and guiding the work of the new grant position.

Internal Alignment:

Insufficient market data was available and therefore internal alignment was analyzed. At this time, the Grant Administrator is aligned 5% below Budget Coordinator; grade 102, \$31.76-\$41.29.

Recommendation:

Based on my review of the Grant Administrator position, I recommend the position be reclassified equal to Business Analyst; grade 111, \$35.52 - \$46.18. Both positions require 4 years of progressively responsible experience in addition to a bachelor's degree with major course work in accounting, finance, business administration, public administration, or a related field.

I do not recommend the position be equal to the Finance Supervisor as the Finance Supervisor has a larger risk of exposure and a greater breadth of job knowledge to include A/P, A/R and payroll. In addition, the Finance Supervisor has 6 direct reports and two interns.

Crystal is currently earning \$32.72, Step 2. It is recommended Crystal's pay be adjusted to \$37.69, Step 2, of the recommended pay range as she has been performing the more complex job duties since 2021 and the lead responsibilities since April 2022. It is also recommended she be eligible for the annual step increase payable in April 2023. The recommended effective date for this change is retro-active to 12/25/22, pay period 1. This change would result in an 15% increase in pay for the incumbent.

In anticipation of the job audit completion, a placeholder of \$101,829 was budgeted in 2023. The recommended change would result in a savings of \$4,747 to the general fund.

In addition, it is recommended the position retain the title Grant Administrator and the other grant position be retitled Grant Specialist.

Memorandum

TO: Shelley Caskey, Human Resources Director
FROM: Jodi Welch, Finance Director
DATE: December 5, 2022
SUBJECT: Job Audit Grant Administrator-Finance Department

Attached is the completed Job Analysis Questionnaire (JAQ) for the Grant Administrator position currently held by Crystal Madrigal which is assigned to the Finance Department and reporting directly to the Finance Director.

This position was a new position to the organization and authorized originally in 2020 but put on hold due to economic uncertainties related to COVID. The position was filled by Crystal in July of 2021, and at that point reported directly to the Deputy Finance Director, Scott Rust. When Scott resigned, I re-assigned the position to directly report to me as the Finance Director.

When Crystal came into the position, we had no formal process, procedure, or systems in place for grant administration. Collectively with Scott she began developing that grant administration system. In the first few weeks of Crystal's employment we had a compliance issue with a Federal granting agency which was significantly mishandled by another department's employee. This situation was critical and immediately enveloped all of her time to address. Crystal took the lead on understanding what needed to be done to resolve the issue and effectively keep the City from being placed on a high risk list for Federal Funding. This very first exercise revealed the risk and exposure to the organization of not having a formal system or a central position responsible for coordination and oversight. This awareness led to the request and authorization for another grant administrator position in 2022.

As the country continues to recover from the Pandemic and deals with a weakened economy, Federal and State funding resources are being released at a rapid pace with significant levels of funds available. Because of the desire to get these funds working in the economy quickly the timelines for application are very aggressive. Crystal has been instrumental in coordinating the application of numerous grants, far more than an average grant position usually manages, and with a high success rate.

The second grant administrator position was filled after an internal/external recruitment and resulted in the promotion of Stevie Oviatt, who was an Accountant/Analyst I in the Finance Department. It has taken months to backfill her position and get the new accountant trained. Now that the transition has taken place, Crystal has very clearly assumed a lead role in training and guiding the work of Stevie. Crystal has evaluated

Stevie's skills and strengths as they apply to the job responsibilities and has effectively capitalized and developed those skills to serve the operation very well.

As I have directly observed the development and evolution of the grant administration system, there are several facts that lead me to the conclusion that Crystal is functioning at a supervisory and program management level in her position. In particular, Crystal in this position is required to work extremely independently in an area that inherently has a high level of risk and exposure. She works directly with Department Directors and the City Manager on a daily and weekly basis. She is responsible for tactfully directing and redirecting senior personnel including Directors as they work through grant applications and compliance. She also represents the City by working directly with high level staff in granting agencies which requires sophistication and diplomacy skills.

After review of the attached job analysis questionnaire and in consideration of the above, as well as my personal direction of the work of Crystal and this position I am confident she is functioning at a higher level than a Grant Administrator. Finally, we are in need of a supervisor to oversee this critical operation and although small now will certainly grow into the future. Based on the responsibilities of the position as well as the risk and exposure of the work, I recommend this position and Crystal be reclassified to a Grant Administration Manager or Grant Administration Supervisor, and the compensation being equal to that of the Finance Supervisor position. Finally, attached is a draft of the job description for reference.

CITY OF GRAND JUNCTION

JOB ANALYSIS QUESTIONNAIRE

I. EMPLOYEE BACKGROUND: In this section you will provide information regarding your name, current job title, your immediate supervisor, etc. This will help us make sure we refer to the correct job throughout the study.

Is this a group questionnaire? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, please list all employee names.
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Division:

Department:

For Individual Questionnaires Only:

Employee Name:	Madrigal	Crystal	A
	(Last)	(First)	(Middle Initial)

Current Classification Title: Grant Administrator

Division	Grant Administration	Department	Finance
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Total Length of Time with organization 1 Years 3 months

Total Length of Time in Current Position 1 Years 3 months

Assigned Hours/Week:: from 8 to 5 Assigned Days/Week 5

Email: Crystalm@gjcity.org Work Phone: 970-244-1566

Immediate Supervisor:

Immediate supervisor reports to:

Name: Jodi Welch

Name: Greg Caton

Title: Finance Director

Title: City Manager

Work Phone 970-244-1515

Work Phone: 970-244-1502

E-mail: jodlr@gjcity.org

E-mail: gregc@gjcity.org

II. POSITION INFORMATION

1. POSITION SUMMARY: This section asks for a short paragraph, one to three sentences, regarding the purpose of your position and/or your primary responsibilities. This summary helps us to quickly understand the essence of your job. Usually it is better to write this after you have completed the remainder of the questionnaire. Briefly describe what you consider to be the major purpose or objective of the job. Simply stated, what are you attempting to accomplish in your position?

Example: Computer Support Technician

Summary: To operate, maintain and repair computer equipment and to provide technical assistance to users.

Coordinate and oversee City-wide grants administration program; grant research, writing, application, administration, and reporting; monitor programs to ensure compliance with specific regulations; provide administrative and technical support for all City departments' grant programs; participate in budget development and management for grant funded programs and projects; provide high level responsible staff assistance to the Deputy Finance Director and the Finance Director.

2. SUPERVISION & ORGANIZATIONAL RELATIONSHIPS.

- a. The chart below asks for your specific supervisory responsibilities. If a duty statement applies to you, please check the box under the "Yes" column and then indicate the number of employees for which you are responsible to the right of the statement.

Yes	Duty	Number of Employees
<input checked="" type="checkbox"/>	I do not officially supervise other employees (sign performance reviews).	
<input type="checkbox"/>	I evaluate and sign performance reviews of other full-time employees.	
<input type="checkbox"/>	I evaluate and sign performance reviews of part-time, temporary or contract employees.	
<input checked="" type="checkbox"/>	I instruct other employees in methods or procedures needed to carry out their job (how to carry-out their assigned duties).	
<input checked="" type="checkbox"/>	I make work assignments for others.	
<input type="checkbox"/>	I make hiring and hiring pay recommendations.	
<input type="checkbox"/>	I make hiring and hiring pay decisions.	
<input type="checkbox"/>	I recommend termination for poor performance.	
<input checked="" type="checkbox"/>	I provide advice to peers that they must consider carefully before making a decision.	
<input checked="" type="checkbox"/>	I provide information to supervisors/management that they use in making a decision.	

- b. Complete the organization chart below. This chart will help us to understand your job in relation to others in your department. Please use titles and not names. Fill in the applicable position titles: (1) your coworkers, employees you work with and who also report directly to your supervisor; and, (2) your subordinates, any employees you supervise directly. List only those jobs over which you have full managerial/supervisory authority (i.e. complete and sign performance evaluation.) Do not list employees supervised by your subordinate supervisors.

YOUR COWORKERS' JOB TITLES

Deputy Finance Director
Budget Coordinator
Accountant/Finance Analyst II
Auditor
Grant Administrator

YOUR DIRECT REPORTS' JOB TITLES

Please indicate the nature of the group supervised and the number supervised

☐ Full Time ☐ Part-Time ☐ Seasonal/Temp ☐ Volunteer ☐ Contract

3. ESSENTIAL DUTIES.

The list of essential duties helps us to understand those duties which are the primary reasons why your position exists. For clarification, please refer to the examples provided below.

Essential Duties: Those duties that make up at least 5% of your time. Please provide enough detail so that someone who may not be familiar with your job will have a clear understanding of what it is that you do. For example, do not simply state "prepares reports", but state "prepares reports such as status reports, staff reports", or other type of report(s) you may prepare. Also, please use action verbs such as prepares, calculates, operates, etc., to start off each statement. Do not use acronyms in your description. Examples are shown below. Use additional sheets if needed.

Decisions Required: List the decisions you make to carry out the essential duties.

Frequency: Indicate how often you perform each duty – D = daily, W = weekly, M = monthly, Q = quarterly, A = annually, or O = occasionally.

Percent of Time: Indicate how much of your time you spend on each task. The total of these percentages should not be more than 100%. Example: Sally conducts property value estimates 20% of the time, it may mean she spends one day out of five on that task, or that she spends around two hours each day. These need only be estimates so do not spend a great deal of time trying to come up with an exact percentage. The percentages of all duties should equal 100% over a one year period of time.

Attach additional sheets if necessary.

EXAMPLE (LIST ACTUAL ESSENTIAL DUTIES BELOW EXAMPLE)

Essential Duties	Decisions Required	Frequency	% of Time
EXAMPLES:			
<i>Prepares monthly newsletters by gathering information, writing copy, editing, preparing for publication and overseeing distribution.</i>	<i>Articles to include, editorial changes, graphics, layouts</i>	<i>M</i>	<i>25%</i>
<i>Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	<i>M</i>	<i>10%</i>

	List of Essential Duties	Decisions Required	Frequency: D = Daily W = Weekly M = Monthly Q = Quarterly A = Annually O = Occasionally	% of Time Spent (Not to exceed 100%)
1	Conduct research and identify grant funding opportunities from public, private, federal, state, and local sources for all City departments. Disseminate grant information to departments regarding availability of funds to assess interest	organization eligibility, ROI,	Daily	15%
2	Develop and compose grant proposals to obtain available government and private funding from various programs and projects on behalf of City departments.	Information, data, pictures and graphics to include, layout, budget items & categories	Weekly	20%
3	Develop and manage the City-Wide grant administration system including software, processes, and procedures for the effective administration of grants ensuring compliance and effective internal controls	language, applicability, design of procedures & systems	Monthly	15%
4	Prepares Ordinance, Resolutions, agendas, agreements and other grant-related documents as directed. Preparing reports and statistical analysis of grant activity for use by management and City Council.	language, additional materials, timing	Monthly	10%
5	Coordinate directly with Department Directors as well as other assigned staff on grant opportunities, application, reporting, and compliance, including communication and meetings with granting agencies. Provide administrative and technical support for the Department's grant programs	scheduling, timelines, language, information to include, systems used	Daily	20%
6	Review grant expenditures for compliance with applicable regulations; monitor grant fiscal records for compliance with grant contracts; Review or oversee the preparation of grant required reports and submit to organizations as required by the grant document. Maintain tracking of grant status for auditing/budgeting and information for statistical reports. Work with other Finance staff for the reconciliation of grants.	information to include, formatting where applicable, budget categories, contract compliance	Weekly	20%
7			Select	
8			Select	
9			Select	
10			Select	

11			Select	
12			Select	
13			Select	
14			Select	
15			Select	
16			Select	
17			Select	
18			Select	
19			Select	

4. REQUIRED KNOWLEDGE AND SKILLS.

This section helps us to understand the types of knowledge and skill you would need to perform your job at the entry level. Those items you list are those required and not what you might necessarily know or are able to do after being in the position for a number of years.

Knowledge: refers to the possession of concepts and information gained through experience, training and/or education and can be measured through testing.

Skills: refers to the proficiency which can be demonstrated and are typically manual in nature and/or can be measured through testing.

The knowledge and skills that you list in the following section must refer to the Essential Duties you listed in Section 3.

Duty #	Knowledge – Skills
1	Grant funding and administration practices. Research methods and techniques, and methods of presentation. City projects and priorities City's budget
2&4	Business English, grammar, punctuation and spelling; the application of such to a variety of formats, styles, and editing principles and techniques. City projects, priorities, and budget Grantor web-based application and reporting programs.
3	Automated financial information systems and integrated business office software. Modern office technology and equipment, including computers and related software applications. Applicable Federal, State and local codes, laws and regulations Principles and practices of report and record maintenance, including metrics and analytics. Principles and practices of organization, management, and financial administration.
5	Principles and practices of effective public relations. Business English, grammar, punctuation and spelling; the application of such to a variety of formats, styles, and editing principles and techniques. Grant funding and administration practices. Grantor web-based application and reporting programs.
6	Applicable Federal, State and local codes, laws and regulations. Grant funding and administration practices. Grantor web-based application and reporting programs.

	Principles and practices of municipal budget preparation and administration. Principles and practices of organization, management, and financial administration.

III. EDUCATION, EXPERIENCE, AND EQUIPMENT

1. EDUCATION: What level of education do you have and what minimum level of education do you believe is needed to satisfactorily perform your job at entry level? Check the level that applies to your job:

You Have	You Need	
<input type="checkbox"/>	<input type="checkbox"/>	Less than High School Diploma or equivalent (G.E.D.) (ability to read, write, and follow directions)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	High School Diploma or equivalent (G.E.D.)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Up to one year of specialized or technical training beyond high school
<input type="checkbox"/>	<input type="checkbox"/>	Associate degree (A.S., A.A.) or two-year technical certificate
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bachelor's degree
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Other (explain): Graduate level course work in finance, accounting and management

2. EXPERIENCE: What kinds of experience do you have, and what minimum kinds of experience are needed to enter your job at entry level?

Type of Experience

<u>You Have</u>	<u>Your Time</u>	<u>You Need</u>	<u>Minimum Time Required</u>
experience in grant writing, grants administration, and management	6 years	experience in grant writing, grants administration, and management	5 years
	years		years
	years		years

a. What field (s) should training or degree be in?

Bachelor's degree from an accredited college or university with major course work in accounting, finance, business administration, public administration or a related field.

3. SPECIAL REQUIREMENTS: List any registrations, certifications or licenses that are **required** for you to hold your position. Be specific and do not abbreviate words or use acronyms.

4. DECISION-MAKING & JUDGMENTS.

a. Describe three types of important decisions and judgments you make regularly and independently in the performance of your duties.

1. Opportunity alignment with organization priorities, projects, and goals, as well as determining eligibility of the organization, potential ROI, and final recommendations to Departments.

2. Application preparation decisions regarding information, data, and materials to include, as well as assisting in the development of grant budgets.

3. Communication and facilitation of communication with internal and external stakeholders and granting entities.

IV: EMPLOYEE, SUPERVISOR, AND DEPARTMENT HEAD SIGNATURES

ADDITIONAL COMMENTS

Are there any additional comments you would like to make to be sure you have described your job adequately? (Use additional sheets if necessary).

In addition to the duties above, I am responsible for leading and facilitating cross-departmental applications, working and communicating with Department Director and other high level employees as well as community partners.

EMPLOYEE CERTIFICATION

I certify that the above statements and responses are accurate and complete to the best of my knowledge.

Signed: _____

Cristal Madrigal

Date: _____

12/5/22

TO BE COMPLETED BY THE IMMEDIATE SUPERVISOR AND DEPT. HEAD

This section is to be used by the Supervisor to note any additional comments, additional duties or disagreements with any section of the questionnaire. The Supervisor should not change anything written by the individual filling out the questionnaire nor should they address any performance issues. Please remember that this questionnaire is intended solely for the purpose of accurately describing the job in question. Supervisors, please review the entire JAQ for completeness and accuracy. If there are sections that are not complete or are incorrect, please fill in the blanks when you review the questionnaire with the incumbent. If you disagree with any information provided or believe some information is missing, indicate below the question number and your comments. **Please note the form should have all three signatures to ensure all have read the questionnaire.**

Question No.	Comments
	see attached memorandum

Employee Signature:

Cristal Madrigal

Date:

12/5/22

Supervisor
Signature:

[Signature]

Date:

12/5/22

Department Head
Signature:

[Signature]

Date:

12/5/22

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GRANT ADMINISTRATION MANAGER/SUPERVISOR

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

Coordinate and oversee City-wide grants administration program; grant research, writing, application, administration, and reporting; monitor programs to ensure compliance with specific regulations; provide administrative and technical support for all City departments' grant programs; participate in budget development and management for grant funded programs and projects; provide high level responsible staff assistance to the Deputy Finance Director and the Finance Director.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Deputy Finance Director.

Exercises direct supervision over assigned grant administration staff.

PRIMARY DUTIES--*The following are examples of primary duties assigned to positions in this classification. Other related duties and responsibilities may be assigned.*

1. Plan, prioritize, assign, supervise and review the work of assigned staff; participate in the selection of assigned staff; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline procedures.
2. Develop and manage the City-Wide grant administration system and strategies including software, processes, and procedures for the effective administration of grants to ensure compliance and effective internal controls.
3. Participate in the annual budget development process.
4. Responsible for conducting research and identify funding opportunities from public, private, federal, state, and local sources for all City departments. Disseminate grant information to appropriate departments regarding availability of funds to assess their interest.
5. Develop and compose grant proposals to obtain available government and private funding from various programs and projects on behalf of the City departments.
6. Coordinate directly with Department Directors as well as other assigned staff on grant opportunities, application, reporting, and compliance, including communication and meetings with granting agencies.
7. Prepares Ordinance, Resolutions, agendas, agreements, grant reports and presentations, and other grant-related documents as directed.
8. Provide administrative and technical support for the Department's grant programs.
9. Positively represent the City and maintain collaborative and effective working relationships with external interests (i.e., auditors, banking institutions, investment companies, funding agencies, community partners/representatives, and state regulators).
10. Provide training and technical assistance related to all grant activities.
11. Establish and maintain record system for available grants and completed grant applications.

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GRANT ADMINISTRATION MANAGER/SUPERVISOR

12. Provides financial oversight for administration of grant funds: conducts routine monitoring; prepares grant budgets, budget amendments, budget change forms, and related documents; assists in accounting for expenditures of grant funds; obtains from each grant contact person quarterly reports reflecting expenditures and reimbursement requests for the preceding period; ensures completion and submission of required financial reports in accordance with grant/contract guidelines.
13. Coordinate grant management functions and monitor compliance with grant policy.
14. Attend and participate in professional group meetings; stay abreast of new trends and innovations in the grant management and administration.
15. Assign certain grants and/or related responsibilities to grant administrator and coordinate their activities related to the grants/activities assigned.
16. Serve as a liaison with Department Directors on issues regarding grants.
17. Conducts mock audits on all grant programs prior to end of the City's fiscal year: utilizes results to identify and correct problems involving accounting and reporting.
18. Compiles or monitors administrative and/or statistical data pertaining to grant activities: prepares status, quarterly, year-end, and other related reports; maintains associated files/ records.
19. Assists with special projects as assigned; performs related work as required and as directed.

QUALIFICATIONS

Knowledge of:

Grant funding and administration practices.

Grantor web-based application and reporting programs.

Principles and practices of municipal budget preparation and administration.

Principles and practices of organization, management, and financial administration.

Principles and practices of effective public relations.

Principles and practices of report and record maintenance, including metrics and analytics.

Research methods and techniques, and methods of presentation.

Business English, grammar, punctuation and spelling; the application of such to a variety of formats, styles, and editing principles and techniques.

Automated financial information systems and integrated business office software.

Modern office technology and equipment, including computers and related software applications.

Applicable Federal, State and local codes, laws and regulations.

Ability to:

Write effectively and assemble competitive, responsive grant applications.

Research, compile and develop clear, concise and accurate reports and associated documentation to facilitate effective decision making.

Properly respond to applications for outside funding and to be successful in obtaining funding.

Articulate, demonstrate and train others concerning current laws, standards and best practices as applied to governmental accounting and grants administration.

Establish and maintain accurate, organized and detailed documentation and files for ready access and retrieval.

Establish and maintain effective working relationships with those contacted in the course of work.

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GRANT ADMINISTRATION MANAGER/SUPERVISOR

Exercise sound judgment and maintain confidentiality regarding critical and sensitive information, records, and reports.

Communicate clearly and concisely, both orally and in writing.

Interface with City consultants, department heads, grant project coordinators, granters, elected officials, and the general public.

Work independently and following through with assignments with minimal direction.

Experience and Training Guidelines

Equivalent to:

Experience:

Five (5) years of progressively responsible experience in grant writing, grants administration, and management, preferably in a governmental environment.

Proven track record of grant writing and administration is preferred.

Training:

Bachelor's degree from an accredited college or university with major course work in accounting, finance, business administration, public administration or a related field.

Other combinations of experience and education that meet the minimum requirements may be substituted.

License or Certificate

Possession of, or ability to obtain, a valid Colorado driver's license.

WORKING CONDITIONS

Environmental Conditions:

The job is performed in the following working environment:

Office environment.

Physical Conditions:

The job is characterized by:

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

The following physical activities are very or extremely important in accomplishing the job's purpose and are performed on a daily basis:

While performing the duties of this job, the employee is required to sit for prolonged periods. The employee is regularly required to see, hear, talk, stand, twist and use repetitive motions in the conduct of work. The employee is also required to perform light lifting.