Job Description

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job.

<table>
<thead>
<tr>
<th>Job title</th>
<th>Grants and Loans Manager</th>
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**GENERAL PURPOSE**

Under administrative direction, plans, organizes and directs the activities and staff performing work related to grant and loan proposal development and submission; provides management oversight in ensuring compliance with the requirements of awarded loans and grants and ensures that all assigned operations and functions serve the needs of the District, while complying with applicable laws and regulations; and performs related duties, as assigned.

**DISTINGUISHING CHARACTERISTICS**

This is a management classification responsible for planning, organizing, reviewing, and evaluating the development and monitoring of grant proposals and contract bids for research, capital improvement, and expert consulting. Incumbents are responsible for performing diverse, specialized and complex work involving significant accountability and decision-making responsibilities, which include coordinating grants and loans through various departments and outside entities and grant budget administration and reporting. Incumbents serve as a professional-level resource for organizational, managerial, and operational analyses and studies. Performance of the work requires the use of considerable independence, initiative, and discretion within broad guidelines.

**SUPERVISION RECEIVED AND EXERCISED**

 Receives administrative direction from the Director of Engineering Services. Exercises direct supervision over technical support staff.

**TYPICAL DUTIES AND RESPONSIBILITIES**

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this position.

- Plans, organizes, supervises, trains and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and development; recommends compensation and provides other rewards to recognize
performance; subject to management concurrence, takes disciplinary action, up to and including termination, to address performance deficiencies, in accordance with the District's rules, policies, and labor contract provisions; identifies best-of-class work practices among assigned staff and assures uniform adoption of those practices.

- Provides day-to-day leadership and works with staff to ensure a high performance, customer service-oriented work environment which supports achieving the department’s and the District’s mission, strategic plan, objectives, and values.

- Participates in the development and implementation of goals, objectives, policies, and priorities for assigned services and programs; identifies resource needs; recommends and implements policies and procedures, ensuring alignment with the District's Strategic and Operational Plans.

- Manages and participates in the development and administration of the department’s annual budget; directs the forecast of additional funds needed for staffing, consultants, contractors, equipment, materials, and supplies; directs the monitoring of and approves expenditures; directs and implements adjustments as necessary to meet changing conditions.

- Monitors State, Federal, and other agencies for potential grant opportunities; effectively identifies and explores grant and loan opportunities from a network of established professional contacts.

- Coordinates the development of proposals with management staff and outside consultants; evaluates and recommends funding sources to senior management.

- Plans and conducts meetings with staff to discuss upcoming grant opportunities, timeframes for applications to be filed, and provides suggestions for improving the effectiveness and efficiency of the grant administration process.

- Assists staff in preparing budgets for research grants and proposals and provides guidance in completing applications.

- Reviews grants and contract proposals for accuracy, completeness, and compliance with District policies.

- Develops budgets, ensures compliance with sponsor guidelines, processes final proposals, and coordinates with staff and senior management to obtain approval.

- Resolves any pre-award contractual or program issues involved in securing grants.

- Coordinates the implementation of awarded grants and loans.

- Interprets and provides technical knowledge and information about Federal, State or District grants programs to senior management and staff of the affected departments.

- Monitors grant-funded programs to ensure contract compliance.
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- Conducts site evaluations for funded projects to determine consistency with the contract’s scope of work and budget expenditures.
- Prepares required compliance reports for submission to the awarding authorities.
- Prepares and submits required documentation in a timely manner to effect cost-reimbursement for financially funded activities.
- Ensures staff observes and complies with all District and mandated safety rules, regulations, and protocols.
- Performs related duties, as assigned.

**Continuous Improvement Related Duties:**

- Applies Continuous Improvement principles in the deployment of department business plans, processes, and performance measures, ensuring that they align with District's strategies and operational plans.
- Participates in departmental performance assessments and the system of continuous improvements and effectively integrates and evaluates the linkages between the District's key value creation and support processes and related key performance indices.
- Ensures effectiveness of the business processes undertaken by the department and division.
- Defines customer service segments being served and establishes processes to obtain feedback to improve performance.
- Develops, maintains, and utilizes departmental performance indicators in making decisions.
- Establishes performance criteria for assigned staff.
- Ensures a thorough understanding of the Strategic Planning Cycle with each individual's responsibility associated with the cycle.
- The incumbent, while exercising his/her authority, shall abide by and promote the District’s Mission, Vision, and Guiding Principles and adhere to the District’s policies.

**REQUIRED QUALIFICATIONS**

Knowledge of:

- Principles and practices of employee supervision, including work planning, assignment review and evaluation, discipline, and the training of staff in work procedures.
- Principles and practices of leadership.
Organization and management practices as applied to the development, analysis, and evaluation of programs, policies, and operational needs of the assigned area of responsibility.

Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.

Administrative principles and methods including goal setting, program development and implementation.

Principles and practices of budget preparation and administration.

State and federal legislative procedures for loans, grants, and appropriations.

Funding sources.

Practices, methods and techniques for effective grant proposal writing.

Basic knowledge of District operations and current water and wastewater issues, relationships with adjacent and supporting agencies and local governmental bodies.

District and mandated safety rules, regulations, and protocols.

Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.

The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.

Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Continuous Improvement Based Knowledge:

The core values, concepts, and framework of continuous improvement criteria, including the principles of management by fact, and organizational and personal learning.

The means of developing alignment between strategic goals and individual performance standards.

Practices of process mapping (control).

Practices of structured problem solving; the Strategic Planning Cycle and the various responsibilities within that cycle.

Ability to:

Select and supervise staff, provide training and development opportunities, ensure work is performed effectively, and evaluate performance in an objective and positive manner.

Develop and implement goals, objectives, practices, policies, procedures, and work standards.

Provide administrative, management, and professional leadership for the grants and loans program and work unit.

Prepare, administer and monitor a division/department budget.
Analyze administrative problems and make appropriate recommendations.
Select appropriate methodologies and perform mathematical and statistical calculations and analyses.
Prepare evaluations, reports, and proposals with well-supported findings, conclusions, and recommendations in a logical, understandable manner.
Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
Effectively represent the department and the District in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Continuous Improvement Based Abilities:

Develop a systems perspective for managing department operations and its key processes to achieve results.
To use the seven continuous improvement categories and the core values as building blocks for department operations.
Define and explain key processes and process requirements within the department; develop and deploy strategic plan elements and key performance measures consistent with District goals; develop and maintain continuous improvement in all areas of operations.
Develop and monitor performance standards for all divisions within the department.
Ensure department goals and objectives are aligned with other departments, branches, and the District as a whole; track and monitor department performance.
Make sound decisions based on departmental performance indicators.

Experience:
Any combination of experience and education that provides the required knowledge and abilities is qualifying, along with the specific licenses/certifications as outlined below:

Five (5) years of progressively responsible experience in preparing and administrating grants, of which two (2) years is at a supervisory level. Specific training in grant writing or related skills is desired or the ability to complete such
training within 18 months of selection; knowledge of water and wastewater treatment and reclamation and water resource management is desired.

Education:

- Equivalent to a bachelor’s degree from an accredited college or university with major coursework in accounting, business administration, public administration, or related field.

Licenses/Certifications:

- None.

**PHYSICAL DEMANDS**

*The physical demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials, and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas, walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

**WORK ENVIRONMENT**

*The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.
This job description has been reviewed and approved by all levels of management in cooperation with the union (if applicable):

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<tr>
<th>Approved by:</th>
<th>Board of Directors</th>
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<tbody>
<tr>
<td>Date adopted:</td>
<td>October 2, 2019</td>
</tr>
<tr>
<td>Date modified:</td>
<td></td>
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<tr>
<td>FLSA determination:</td>
<td>Exempt</td>
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**Job Description Acknowledgment**

*I have received, reviewed and fully understand the job description for Grants and Loans Manager. I further understand that I am responsible for the satisfactory execution of the essential functions described therein, under any and all conditions as described.*

Employee Name (print): ___________________________ Date: __________

Employee Number: __________________________________________

Employee Signature: ________________________________________