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UCSD Phase 5 All Families
Family Function and Job Function Summary

Job Family	Job Function	Job Summary
Finance	Accounting	Involves accounting functions such as analyzing, monitoring, preparing and reconciling financial information to reflect the condition of the organization and provide financial and other statistical data to control operations. Also may involve preparation of financial reports to meet internal and external reporting requirements. May include activities relating to developing, implementing and monitoring accounting systems, policies and procedures.
Finance	Enterprise Risk Management	Involves protecting the institution from loss. Develops and coordinates activities and programs that are designed to promote accountability. Helps identify and minimize risk of all types, and strengthen effectiveness and efficiency of controls.
Finance	Financial Analysis	Involves developing, interpreting and implementing financial concepts for financial planning, resource planning (dollars), and control of organizational budget. May analyze and prepare recommendations for financial plans, including annual resource allocations, future requirements, and operating forecasts.
Finance	Financial Services	Involves the processing and servicing of a variety of operational, personnel, and financial transactions and services. Includes cashiering, payroll, accounts receivable, accounts payable, purchasing, recharge billing, travel/entertainment, gift accounting, collections, data collection and data entry, analysis, review and control, customer servicing, and reporting.
Finance	Payroll	Involves activities associated with generation of payroll including labor distribution records, vacation and sick leave accrual, overtime and withholding status. Complies with all government reporting requirements for payroll taxes, withholding and employer contributions.

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Finance	Procurement	Involves acquisition of goods and services including equipment acquisition, contracting for professional services, design and/or construction services, business contracts, maintenance services, consulting and personal services.
Finance	Revenue Cycle	Involves revenue cycle functions for the healthcare enterprise, including system billing, reporting and support. Ensures account information contains accurate and comprehensive data to provide timely billing and optimal reimbursement for services. Impacts processes to include charge capture, coding, insurance identification, data entry, billing, payment posting, refund processing and collections. May also be responsible for / integrated with business office operations.
Finance	Strategic Sourcing	Develops strategies that result in best-in-class strategic sourcing practices and supplier relationships. Identifies projects to apply sourcing and purchasing/procurement methodology to leverage annual purchase volume and rationalize supplier base to ensure benefits/savings to University. Partners with internal clients and stakeholders to identify sourcing needs; conduct buyer/market profiles; share marketplace trends; develop sourcing strategies; share best practices and define acceptable service levels.
Finance	Travel	Develops, modifies, and executes company travel policies and procedures. Ensures the accurate compilation, analysis and reporting of travel data. Acts as primary contact with corporate travel agencies and vendors. Negotiates contracts with travel agencies and suppliers. Responsible for adherence to cost control and effectiveness in the travel department. May manage company employees or be responsible for coordinating activities with on-site contractors or outsourced resources providing travel services.

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General Admin	Administrative Operations	Involves managing or performing the administrative services or managing the full general operations of an academic or non-academic organization(s). Administrative services include activities in finance and human resources and may also include IT, facilities, or student services. General management activities include long and short range strategic planning in determining the mission and directing all activities of multi-disciplinary departments through subordinate management staff.
General Admin	Contract Administration	Involves structuring, and / or administrating contractual documents that establish business relationships with contractors, customers and / or partners. Collaborates with internal partners as well as legal staff to structure contracts. Professional contracting services are provided in compliance with all policies and procedures. Analyzes contracts to ensure compliance with all applicable laws, rules, regulations and policies. Advises management of contractual rights and obligations and provides interpretation of terms and conditions.
General Admin	Executive Advising	Involves providing strategic guidance, advising and decision making on behalf of an executive (generally defined as Chancellor, Vice Chancellor, or Vice Provost), relative to strategic academic and resource planning, short and long-range policy development, communications and high level analyses of new program development. In addition to executive advising, may also manage an independent program and / or professional staff engaged in a range of administrative functions.

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General Admin	Executive Assistance	Involves providing administrative oversight for an executive, including the coordination of communications and pertinent data among a group of the executive's subordinate management staff. Performs and / or oversees special projects or assignments that are highly sensitive or complex in nature, requiring a high level of independence and initiative in execution and implementation. Handles details and oversees work of a highly confidential and critical nature to support the executive on matters of significance.
General Admin	Institutional Research	Involves activities associated with supporting strategic planning and decision making through the analysis, presentation, and distribution of institutional related research data. Includes planning and analytical studies, assessment, and reporting on data related to students, academic and non-academic employees, financial, and facilities. May be involved with compliance with informational requests from external agencies.
General Admin	Ombuds	Involves providing impartial, informal, independent and confidential conflict resolution services to all constituencies, which may include faculty, staff and / or students.
General Admin	Organizational Consulting	Involves assessing organizational and strategic issues and providing guidance through organizational development solutions such as facilitating assessments, strategic planning, and culture-change and process-oriented approaches to enhance institutional performance. Consults with leaders, departments, and committees to address root causes of organizational effectiveness issues using a systematic approach. Analyzes current organizational purpose, structure, relationships, policies, systems, and data. Recommends and facilitates improvements ensuring alignment with organizational strategy.

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General Admin	Product Development	Responsible for identifying and investigating new product opportunities within a defined range of responsibility. Develops project plans and manages the design, development, testing, and documentation of select products, services or enhancements. Formulates and executes business plans for product development and launch. Develops and participates in public outreach activities and informational campaigns to promote awareness of products or services. Maintains knowledge of new trends and products in the appropriate markets.
General Admin	Project and Policy Analysis	Involves analytical studies on a variety of policies, projects, programs and issues in support of a function, program and / or organizational unit, or in research of new or changing systems and programs. Assists in policy and program planning, development and administration; interprets, monitors and analyzes information regarding policies and procedures and provides consultative services regarding general management to department administrators.
General Admin	Records Management	Involves developing and managing procedures that promote sound, efficient, and economical records management, which includes creation, organization of, and access to records; maintenance, retention and disposition of administrative records; and security and privacy of records. Supports the management of recorded information, consults with users to develop compliant, secured and trustworthy record keeping systems that are efficiently maintained, establishes processes and guidelines to dispose of records when their administrative, legal, audit, regulatory and historical value have ceased. Ensures compliance to standards, applicable laws and internal policies, and operating procedures for consistent creation, maintenance and use, and disposition of University records. May include classifying, storing, securing, and destroying (or in some cases, archival preservation) records or consulting others on how to apply best practices to such activities.

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General Admin	Vendor Relations Management	Involves administration and operational oversight of vendors for outsourced activities, projects and programs in collaboration with key stakeholders. Evaluates vendor logistical and performance capabilities, establishes vendor monitoring and tracking processes, and assesses vendor performance using a variety of vendor management strategies (e.g., service level agreements, operational audits, surveys, etc.) to ensure continuous improvement. Monitors participant satisfaction with vendor services. Provides liaison to stakeholders / users of vendor services and handles escalated problems and program appeals.
Human Resources	Academic Human Resources	Involves recommending, developing, implementing, administering, coordinating, and/or evaluating Academic Human Resources policies, labor contracts, statutes, programs, and procedures covering one or more of the following: academic recruitment, appointment, and advancement; compensation and salary administration; faculty welfare programs; visa procurement; benefits; payroll; training and development; faculty misconduct; and faculty equity.
Human Resources	Benefits	Involves administering and communicating benefits programs. Influences, shapes and collaborates on employee benefit programs. May provide training to departments on employee benefit programs, and workshops on new / amended benefit programs.

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Human Resources	Benefits Program Strategy	Involves design, development, and procurement of health and welfare, work / life, retirement or other employee benefit programs and policies. Negotiates and manages insurance contracts to ensure the most favorable coverage, cost, terms and plan design for employees and the organization. May administer self-insured plans or coordinate with contracted administrative services. Consults with all levels of management and constituent groups on benefit programmatic and financial / budgetary considerations.
Human Resources	Compensation	Involves developing, implementing and administering compensation policies and programs. Reviews job evaluations requests and proposals, and provides advice on job evaluation, position management, and position salary-setting.
Human Resources	Employee Relations	Involves the design and administration of programs, procedures and plans related to employee workplace issues such as conduct, discipline, performance, communications, policies and procedures. Uses employee relations concepts and applies policies and procedures to resolve a variety of employee relations issues and situations. Works in collaboration with other functional areas of human resources.
Human Resources	Employment	Involves developing, implementing and / or maintaining recruitment and other employment and sourcing programs and policies. Provides advice and counsel on employment practices and recruitment processes.
Human Resources	Equal Employment Opportunity	Involves developing, implementing, and / or administering diversity, equal employment opportunity and affirmative action efforts in order to comply with government legislation and management directives and support equity and inclusion programs. Provides advice and conducts analyses of the organization's related programs to ensure compliance with government legislation, and monitor progress toward organizational goals.

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Human Resources	HR Generalist	Involves recommending, developing, implementing, administering, coordinating, and / or evaluating Human Resources policies, labor contracts, statutes, programs and procedures covering several of the following: recruitment, compensation, employee relations, labor relations, payroll, benefits, welfare programs, training and development, visa procurement, inter-location transfers, and employee services.
Human Resources	Labor Relations	Involves establishing and maintaining satisfactory labor-management relations, including monitoring and ensuring adherence to contract provisions, participating in negotiating sessions, addressing grievances and questions of a specific group of union employees.
Research Admin	Academic Program Management	Involves managing a significant, independent academic or research program. Formulates program strategies and goals. Plans, directs and controls program budget and other related resources.
Research Admin	Contracts and Grants	Involves providing analytical and financial support in proposal processing, contract and grant administration, and budget development, including pre-award proposal initiatives, management of funds post-award, and closeout activities for federal, state, local and private sponsors. Involves activities associated with forecasting, planning, and managing of research portfolios by performing some or all of the following: coordinating and identifying and developing and / or presenting proposals, contracts and other agreements; reviewing proposals to ensure institutional compliance; negotiating, administering and monitoring contract and grant awards, including compliance with regulations, terms and conditions; financial management and reporting; and sub award / subcontract issuance and administration.

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Research Admin	Intellectual Property	Involves advising on intellectual property (IP) rights protection, business startup and other technology transfer related issues. Evaluates the commercial potential of research results, obtains and manages the appropriate IP rights protection, markets inventions and software, and / or biological / tangible materials; drafts and negotiates, and manages IP licenses and Material Transfer Agreements (MTAs), Non-Disclosure Agreements (NDAs), and advises on IP terms in research and collaboration agreements. Supports companies who wish to sponsor research and / or license technologies. Facilitates administration of federal and state laws regarding research, conflict of interest, IP, contracts and employment. Works with outside patent attorneys to file patent applications.
Research Admin	Research Compliance	Involves staffing, administering or managing research oversight and compliance committee activities related to research activities such as human subjects, animal use and care, conflict of interest and export control. Reviews research protocols for use in specific fields, assists in writing and reviewing protocols, and compliance with federal, state, and University mandated laws, regulations and policies.
Research Admin	Research Grant Program Admin	Involves oversight and coordination of research grant programs, including program development, planning and evaluation, peer review and applicant relations, grant application and award management, and synthesis and dissemination of research findings.
Research and Lab	Animal Care	Involves conducting or assisting with routine, emergency and critical veterinary care and animal husbandry activities for clinical or laboratory animal patients. May be involved in conducting or assisting with research and teaching projects including development and design of animal protocols. May involve internal and public outreach. May include instructions of students, volunteers and clients.

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Research and Lab	Animal Field Research	Participates in independent animal research programs, including identification of funding support, outreach / marketing activities, and teaching and curriculum development. Coordinates activities in support of training and research goals.
Research and Lab	Clinical Research Human Subjects	Involves the development of and ensures compliance with clinical study protocols that involve human subjects. Oversees and resolves operational aspects of clinical studies or trials in conjunction with project teams and in accordance with standard operating procedures and good clinical practice and regulations. May be responsible for budget, clinical supply operations, site and vendor selection.
Research and Lab	Field Research	Involves the on-site administrative, research, facilities management and / or cultivation functions involved in establishing and maintaining environmental field research sites. Field sites represent a diverse range of eco-regions to support of a variety of research activities.
Research and Lab	Lab Instruction	Involves the application of specialized academic or scientific knowledge to perform or develop experimental procedures as part of academic instructional lab and / or research programs. Responsible for laboratory instruction methodologies and protocols and performing experiments and teaching exercises. Troubleshoots problems with equipment and materials during classroom exercises. May perform literature research, data analysis and participate in teaching.
Research and Lab	Lab Research	Involves conducting or supporting laboratory research, which may include routine or non-routine laboratory operations, data interpretation, development and performance of technical protocols and procedures, design of experiments, literature studies, and preparation of scientific papers.

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Research and Lab	Research Data Analysis	Involves gathering, analyzing, and interpreting a wide variety of research data, which may include selecting data samples, preparing questionnaires, and analyzing collected information according to established statistical methods. Prepares reports, charts, tables, and other visual aids.
Research and Lab	Survey Research	Involves collection of survey data; may conduct research, including the design and validation of survey instruments.