

## Table of Contents

Target Audience for Level 2: Intermediate Curriculum.....	2
Career Tracks Information .....	2
Scope of the Position .....	2
Generic Scope .....	2
Custom Scope .....	2
Key Responsibilities.....	2
Knowledge, Skills and Abilities (KSAs).....	3
Expectations.....	3
Job Knowledge .....	3
Organizational Development.....	3
Initiative and Independence .....	3
PI and Department Business Office/MSO Relationship.....	3
Problem Resolution.....	3
Guidelines Used in Performance Duties.....	4
Innovation and Originality .....	4
Expected Volume .....	4
Expected Complexity.....	4
Expected Competency .....	4
Appendix .....	5
Phase 5 Career Tracks Family and Function Summary.....	5
Research Administrator Contracts and Grants Professional Matrix .....	5
Academic Affairs Proposed Classification Matrix for Sponsored Research Administrators .....	5
Training to Expertise Job Aid.....	5

## Target Audience for Level 2: Intermediate Curriculum

### Career Tracks Information

- **Family:** Research Administration
- **Function:** Contracts and Grants
- **Job Category:** Professional
- **Job Level:** Intermediate
- **Performance Program:** PSS4
- **Career Tracks Job Title:** Research Administrator Specialist 2
- **Supervision:** General Supervision
- **Act as a Supervisor:** No
- **Environment:** Campus, medical center or other university setting and various external venues.
- **Education:** Bachelor's degree and one year demonstrated business experience, or equivalent.
- **Career Path 1:** Research Administrator 3
- **Career Path 2:** Research Administration > Research Compliance > Professional

### Scope of the Position

#### Generic Scope

Professional who applies acquired job skills, policies, and procedures to complete substantive assignments/ projects / tasks of moderate scope and complexity; exercises judgment within defined guidelines and practices to determine appropriate action.

#### Custom Scope

Under general supervision develops and/or oversees research proposals, awards and/or transactions related to contract and grant management and maintains contract and grant records in compliance with institutional and research sponsor policies. Works on proposals of moderate scope such as single investigator NSF proposals where analysis of financial information or reports requires review of a variety of factors (e.g. budgets, salaries, expenses, etc. Receives assignments on project basis and fully analyzes problems, gathers data and information and recommends solutions. May be eligible for delegated signature authority. Completes and approves transactions for signature by manager or other authorized institutional official.

### Key Responsibilities

- Dept. Role (DR): Under general supervision, organizes, plans, establishes and monitors fiscal budget control of contracts and grants administration, gifts, endowments and privately funded projects for faculty research programs.
- (DR): Analyzes transactions, expenditures, identifies and resolves discrepancies, financial and inventory reports. Prepares proposal budgets and support documents that are required by proposal guidelines.
- (DR): Develops and oversees non-competing continuations, supplements and other award/agreement amendments.
- (DR): Applies professional concepts to provide projections, analyze spending and recommend adjustments.

- (DR): Under general supervision provides post-award financial administration and management for research funds in accordance with organization policy and agency requirements.
- (DR): Assists in support of audit as directed by senior staff.

### Knowledge, Skills and Abilities (KSAs)

- Knowledge of applicable federal, state, local, sponsor and institutional regulations, policies and guidelines.
- Knowledge of applicable compliance requirements related to use of human or animal subjects in research, financial conflict of interest, biosafety, etc.
- Maintains current knowledge of compliance regulations in all areas of research administration.
- Ability to manage a high volume of transactions.
- Ability to perform moderately complex financial analysis and customized reporting.
- Demonstrated knowledge of generally accepted accounting, fiscal and reporting principles.
- Demonstrated competence in the use of spreadsheet and database software in financial analysis, fiscal management and financial reports.

### Expectations

#### Job Knowledge

Understanding of research administration guidelines of Federal and non-Federal sponsors; Familiarity with OMB circulars/Uniform guidance; Familiarity with generally accepted accounting principles; Familiarity working with computer and information management systems; Familiarity with most common sponsored award mechanisms; Familiarity with applicable compliance requirements related to the use of human or animal subjects in research, financial conflict of interest, biosafety, etc; demonstrated proficiency in the use of spreadsheet and database software in financial analysis and fiscal management.

#### Organizational Development

Recommends modifications to improve the structure and functions of the administrative unit as well as other interacting administrative units; develops a full understanding of the relationship(s) between the administrative unit and other interacting administrative units; participates in the development of policies and procedures related to the operation of the administrative unit.

#### Initiative and Independence

Knowledgeable of pre- and post-award processes for the administrative unit; anticipates changes to processes and takes initiative to modify tasks to conform to changes; reviews and evaluates RFAs/RFPs/PAs and explains them clearly to interested PIs.

#### PI and Department Business Office/MSO Relationship

Meets regularly with PIs to review award portfolios and discuss opportunities and challenges; recommends potential solutions to challenges; reviews with department MSO solutions agreed to by PI; subscribes to PI awarding agency(ies) funding announcements; reads and interprets OMB Circulars/Uniform Guidance and other awarding agencies' policies and procedures.

#### Problem Resolution

Identifies problems that lack apparent solutions and propose to supervisor alternative(s) that may not be readily apparent.

### Guidelines Used in Performance Duties

Identifies inadequacies in current guidelines and recommends alternatives.

### Innovation and Originality

Develops processes or solutions that utilize innovative or alternate recommendations to existing procedures or standards.

### Expected Volume

Per Academic Affairs Proposed Implementation of the Career Tracks Research Administrator Specialist 2, this may vary depending on the department implementation.

- Proposals Submitted: 5-20 submissions OR \$5M-\$8M proposal submitted annually
- Awards Managed: 10-30 awards OR \$2M-\$4M awards managed annually
- Number of PIs Served: 3-5 PIs, each with up to 7 awards

### Expected Complexity

Per Academic Affairs Proposed Implementation of the Career Tracks Research Administrator Specialist 1, this may vary depending on the department implementation.

- Proposals: Unsolicited proposals; some RFA, RFP, or PA responding proposals; <25% subaward proposals, <25% institutional commitment proposals
- Awards: Regular research awards; <25% subawards; <25% cost sharing
- Self-Supporting Activities: Research recharge operations (income <\$500K/year); training grants
- Contributions to Development: Provide data gathering and analysis to the development of policies and procedures

### Expected Competency

Per the Associate for Talent Development (ATD) Training for Expertise Job Aid:

Level	Expect Level of Expertise	Performance
Level 1: Basics	Beginner/Novice	<ul style="list-style-type: none"> <li>• Follows simple directions</li> <li>• Performs using memory of facts and simple rules</li> </ul>
<b>Level 2: Intermediate</b>	<b>Competent</b>	<ul style="list-style-type: none"> <li>• <b>Makes simple judgements for typical tasks</b></li> <li>• <b>May need help with complex or unusual tasks</b></li> <li>• <b>May lack speed and flexibility</b></li> </ul>
Level 3: Experienced	Proficient	<ul style="list-style-type: none"> <li>• Performance guided by deeper experience</li> <li>• Able to figure out the most critical aspects of a situation</li> <li>• Sees nuances missed by less skilled performance</li> <li>• Flexible performance</li> </ul>
Level 4: Advanced	Expert	<ul style="list-style-type: none"> <li>• Performance guided by extensive practice and easily retrievable knowledge and skills</li> <li>• Notices nuances, connections and patterns</li> <li>• Intuitive understanding based on extensive practice</li> <li>• Able to solve difficult problems, learn fast, find needed resources</li> </ul>

## Appendix

### [Phase 5 Career Tracks Family and Function Summary](#)



Phase 5\_Job Family  
and Function Summ

### [Research Administrator Contracts and Grants Professional Matrix](#)



contract and grant  
family matrix current

### [Academic Affairs Proposed Classification Matrix for Sponsored Research Administrators](#)



Fund Manager  
Classification Matrix

### [Training to Expertise Job Aid](#)



Training for Expertise  
Job Aid.pdf