

Proposed Classification Matrix for Sponsored Research Administrators

UC San Diego Payroll Title (Proposed)		Entry Level Administrative Specialist	Experienced Administrative Specialist	Administrative Analyst	Senior Administrative Analyst	Principal Analyst OR MSO (MSP A)
Career Tracks Job Title (Proposed)		<i>Research Administrator, Specialist 1</i>	<i>Research Administrator, Specialist 2</i>	<i>Research Administrator, Analyst</i>	<i>Research Administrator, Senior Analyst</i>	<i>Contract and Grant Manager 1</i>
Career Tracks Description	Job Level (Career Tracks)	Entry	Intermediate	Experienced	Advanced	Expert
	Education (Career Tracks)	Bachelor's degree in related area and/or equivalent experience/training	Bachelor's degree in related area and/or equivalent experience/training	Bachelor's degree in related area and/or equivalent experience	Bachelor's degree in related area and/or equivalent experience	Bachelor's degree in related area and/or equivalent experience
	Generic Scope (Career Tracks)	Entry-level professional with limited or no prior experience; learns to use professional concepts to resolve problems of limited scope and complexity; works on developmental assignments that are initially routine in nature, requiring limited judgment and decision making.	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.	Experienced professional who knows how to apply theory and put it into practice with in-depth understanding of the professional field; independently performs the full range of responsibilities within the function; possesses broad job knowledge; analyzes problems/issues of diverse scope and determines solutions.	Technical leader with a high degree of knowledge in the overall field and recognized expertise in specific areas; problem-solving frequently requires analysis of unique issues/problems without precedent and/or structure. May manage programs that include formulating strategies and administering policies, processes, and resources; functions with a high degree of autonomy.	Spends the majority of time (50% or more) achieving organizational objectives through the coordinated achievements of subordinate staff. Establishes departmental goals and objectives, functions with autonomy. Manages the accountability and stewardship of human, financial, and often physical resources in compliance with departmental and organizational goals and objectives. Ensures subordinate supervisors and professionals adhere to defined internal controls. Manages systems and procedures to protect departmental assets.
	Custom Scope (Career Tracks)	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. Follows institutional procedures and practices when analyzing or reviewing financial information or reports.	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.	Uses skills as a seasoned, experienced research administrator to independently develop and/or oversee research proposals, awards and/or transactions related to contract and grant management and maintains contract and grant records in compliance with institutional research sponsor policies. Work on proposals of diverse scope where analysis of data requires thorough understanding of complex regulations. Completes and approves transactions for signature by manager or other authorized institutional official. Works on complex proposals that may involve multiple investigators and/or multiple sub awards. Guides less experienced staff. Central Role (CR): Is eligible for delegated signature authority (may vary by campus). Department Role (DR): Typically works on complex proposals such as grants/contracts which require task budgets, option yrs, multiple investigators & multiple sub awards.	Uses advanced contracts and grants concepts to manage high volume and high complexity transactions. May review and guide others in the review of financial and administrative management requirements of research contract and grant proposals, awards and/or transactions to ensure compliance with institutional and sponsor policies. Works independently to assess complex grant, contract and subcontract transactions where analysis requires an in-depth evaluation of variable factors. May be eligible for delegated signature authority. May review and sign transactions for less experienced staff. May serve as a technical specialist in a particular area, such as federal contracts, state contracts, subcontracts or information systems. Central Role (CR): Typically works on highly complex proposals and awards such as grants/contracts which require task budgets, option years, multiple investigators and multiple sub awards. Is eligible for delegated authority.	Receives assignments in the form of objectives and determines how to use resources to meet schedules and goals. Reviews and approves recommendations for functional programs. Provides guidance to subordinates to achieve goals in accordance with established policies. Erroneous decisions or failure to achieve goals results in additional costs and personnel. Manages operations of contracts and grants office and professional staff.
	A, B, & C combined are considered as the classification criteria	I. Volume (A, B & C)				
	A. Proposals Submitted	<5 submissions OR <\$500K proposals submitted annually	5-20 submissions OR \$5M - \$8M proposals submitted annually	>20 submissions OR >\$8M proposals submitted annually	<5 but >\$20M proposals submitted annually	The C&G Manager should be expected to manage proposals up to the volume of Research Administrator 2.
	B. Awards Managed	<10 awards OR < \$2M in awards managed annually	10-30 awards OR \$2M - \$4M awards managed annually	>30 awards OR \$4M-\$6M awards managed annually	<5 but >\$6M awards managed annually	The C&G Manager should be expected to manage awards up to volume of Research Administrator 2.
	C. Number of PIs served	3 PIs or less	3 - 5 PIs, each with up to 7 awards	>5 PIs, each with up to 7 awards	3- 5 PIs	The C&G Manager will probably serve <5 PIs.

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These describe the type of awards expected to be managed and the contributions to development at this level	II. Complexity					
	A. Proposals	Unsolicited proposals only, <\$250K dc annually per proposal	Unsolicited proposals; some RFA, RFP, or PA responding proposals; <25% subaward proposals, <25% institutional commitment proposals	Unsolicited proposals; RFA, RFP, and PA response proposals, subaward proposals, institutional commitment proposals, Program Project or Center applications; Training grant applications; Contracts	Highly complex proposals involving one or more of the following: multiple departments; multiple institutions (subawards); significant institutional cost-sharing; responsive to award agency proposal requirements (RFP, RFA, PA); numerous integrated projects; significant and unique reporting requirements; significant equipment acquisition or fabrication; performance milestones. Such proposals will usually be in excess of \$6 million (direct cost) annually.	The C&G Manager should be expected to manage proposals up to the complexity level of Research Administrator 3.
	B. Awards	Regular research awards	Regular research awards; <25% subawards; <25% cost sharing	Regular research proposals; subawards, cost sharing, Program Project or Center awards; Training Grants; Contracts	Funds managed will be for awards received as a result of submission of proposals described above.	The C&G Manager should be expected to manage awards up to the complexity level of Research Administrator 3.
	C. Self-Supporting Activities	None	Research recharge operations (income <\$500K/year); training grants	Research recharge operations (income \$500K- \$2M/year);	Large, complex (income \$2M - \$5M/year) research recharge operations	Large, complex (income >\$5M/year) research recharge operations
	III. Contributions to Development	Provide input and feedback to proposed changes to policies and procedures	Provide data gathering and analysis to the development of policies and procedures'	Provide team leadership in the development of policies and procedues	Provide team leadership in the development of policies and procedues; approve or recommend for approval changes	Spends the majority of time achieving organizational objectives through the coordinated achievements of subordinate staff. Establishes departmental goals and objectives. Manages the accountability and stewardship of human, financial, and often physical resources in compliance with departmental and campus wide goals and objectives. Ensures subordinate supervisors and professionals adhere to defined internal controls.
IV. Supervision Received	close	general supervision	general supervision	direction	autonomy	
V. Act as Supervisor?	No	No	Can supervise	Can supervise	Yes	

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Other	UC San Diego Payroll Title (Proposed)	Entry Level Administrative Specialist	Experienced Administrative Specialist	Administrative Analyst	Senior Administrative Analyst	Principal Analyst OR MSO (MSP A)
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	VI. Management	None	None	None	Part of the Fiscal Operations Management Team	Manager
VII. Minimum Education or Experience	Bachelor's degree in related area and/or equivalent experience	Bachelor's degree and one year demonstrated business experience, or equivalent	Bachelor's degree and 2 years demonstrated business experience, or equivalent	Bachelor's degree and four years demonstrated business experience, or equivalent. Demonstrated leadership and management experience	Bachelor's degree and 6 years demonstrated business experience, or equivalent. Demonstrated leadership and management experience	
Key Responsibilities (Career Tracks)	Key Responsibility 1 (Career Tracks)	Dept Role (DR): Under close supervision, administers and/or develops grant proposals, applications and support documents in conjunction with PI.	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.	Dept Role (DR): Organizes, plans, establishes and monitors fiscal budget control of contracts and grants administration, gifts, endowments and privately funded projects for faculty research programs.	Dept Role (DR): Leads the organization, planning, establishment and monitoring of fiscal budget control of contracts and grants administration, submissions, budgets, support documents, gifts, endowments and privately funded projects for faculty research programs.	Coordinates operations of department with other contract and grant professionals and managers in the organization.
	Key Responsibility 2 (Career Tracks)	(DR): Under direct supervision, provides post-award financial administration and management for research funds. Assists in preparation of routine proposal budgets and support documents that are required by proposal guidelines.	(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): Prepares complex proposal budgets and support documents that are required by proposal guidelines.	(DR): Administers, in coordination with central and departmental administrators, the administrative and financial aspects of complex, awarded projects with organization-wide impact.	Establishes and recommends changes to policies which affect the department.
	Key Responsibility 3 (Career Tracks)	(DR): Analyzes expenses, develops cost projections, and assists with financial tracking and control.	Develops and/or oversees non-competing continuations, supplements and other award/agreement amendments.	Coordinates proposal submission.	(DR): Provides highly complex projections, analysis and recommendations.	Manages staff review of grant and contract award terms and conditions.
	Key Responsibility 4 (Career Tracks)	(DR): Interprets regulations and guidelines and prepares periodic reports.	(DR): Applies professional concepts to provide projections, analyze spending and recommend adjustments.	Provides post-award financial administration and management for research funds in accordance with organization policy and agency requirements.	Assists in support of audit as directed by senior staff.	Manages, through subordinate supervisors, the coordination of activities of a department with responsibility for results in terms of costs, methods, and employees. CR: Approves terms for acceptance
	Key Responsibility 5 (Career Tracks)	Central Role (CR): Under direct supervision, supports other analysts in negotiation of terms and conditions of research agreements and awards from various sponsors.	(DR): Under general supervision, provides post-award financial administration and management for research funds in accordance with organization policy and agency requirements.	Provides guidance and counsel on complex research administration matters, including compliance regulations, to principal investigators and department Administrators .	Provides guidance and counsel on wide variety of highly complex research administration matters to principal investigators, senior departmental administrators and less experienced department staff.	Manages negotiations with contracting officers to substantiate budget requests and to secure terms and conditions.
	Key Responsibility 6 (Career Tracks)	(CR): Processes research proposals, awards and transactions related to contract and grant management and maintains contract and grant records in compliance with institutional and research sponsor policies.	(DR): Advises department administrators on compliance regulations.	Assists in support of audits as directed by senior staff.	(DR): Ensures complete and accurate collection of research management administration data at all stages of the contract and grant life cycle. Independently oversees award reporting and closeout.	Makes recommendations to higher level managers regarding organization-wide policies and procedures.

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Key Responsibility 7 (Career Tracks)	(CR): establishes contract and grant fund accounts with approval of other analysts or Director.	(DR): Assists in support of audit as directed by senior staff.	(CR): Applies contracts and grants concepts to review complex grant or contract proposals and obtain/verify necessary compliance approvals, and recommend/negotiate needed changes to proposals with PIs and/or department administrators.	Central Role (CR): Administratively reviews complex grant or contract proposals budgets and awards, obtains/verifies necessary compliance approvals.	Develops and monitors operational and budget processes, staff FTE, finance, human resources and space planning.
Key Responsibility 8 (Career Tracks)	(CR): Under direct supervision, administratively reviews grant or contract proposals and budgets, obtains/verifies necessary compliance approvals, and recommends/negotiates needed changes to proposals with PIs and/or department administrators.	Central Role (CR): Under general supervision, works with other analysts in negotiation of terms and conditions of research agreements and awards from various sponsors.	(CR): Previews pre-award update information requested by sponsor representatives before issue of awards and submission.	(CR): Approves/signs-off submission of pre-award update information requested by sponsor representatives before issue of awards.	(CR) Has a delegation of authority status to sign contracts and grants.
Key Responsibility 9 (Career Tracks)		(CR): Applies professional concepts to authorize establishment of contract and grant fund accounts with approval	(CR): Negotiates terms and conditions of complex research agreements and awards from various sponsors.	(CR): Negotiates terms and conditions of highly complex research grant, contract and subcontract proposals and awards from various sponsors.	Functions as organization expert for policies and procedures relating to sponsored projects issues and concerns.
Key Responsibility 10 (Career Tracks)		(CR): Develops professional relationships with sponsor representatives.	(CR): Develops professional relationships with sponsor representatives. Delivers specialized training for education workshops in the area of research administration.	(CR): Reviews and approves or rejects requested fund advance setups or research account updates.	Communicates/teaches advanced/expert research administration such as compliance focused concepts at campus, national, organization level meetings. Develops new programs on special or emerging areas of interest or concern.
Key Responsibility 11 (Career Tracks)		(CR): Under general supervision, provides advice and counsel regarding sponsored projects administration to Department Administrators and PIs.	(CR): Authorizes establishment of complex contract and grant fund accounts with approval of other analysts, Director or other authorized institutional official.	(CR): Maintains professional relationships with sponsor representatives. Delivers specialized training and/or develops content for education workshops in the area of research administration.	Provides training and professional development, either formally or on-the-job, for staff to ensure subject matter knowledge in appropriate areas (e.g., sponsored project administration, post-award administration, et cetera).
Key Responsibility 12 (Career Tracks)		(CR): In compliance with institutional and sponsor policies, establishes mandated recordkeeping.	(CR): Reviews and approves or rejects requested fund advance setups or research account updates.	(CR): Maintains appropriate approvals from applicable compliance committees.	
Key Responsibility 13 (Career Tracks)			Coordinates and implements budget allocations, conceives of and maintains chart of accounts or other data management tools, and related business processes. Prepares journal entries, maintains and reconciles ledger accounts. Participates in gathering data from the general ledger for the collection of information for UBIT, preparing summary schedules, and either answering questions from departments or coordinating getting answers.	(CR): Maintains communication with review committees to learn of new requirements.	

Key Responsibilities (Career Tracks)

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Key Responsibility 14 (Career Tracks)				Applies professional knowledge/experience to prepare, review and/or approve financial transactions.	Reviews budget allocations for policy exceptions, conceives of and maintains chart of accounts or other data management tools, and related business processes. Reviews and reconciles ledger accounts. Participates in gathering data from the general ledger for the collection of information for UBIT, preparing summary schedules, and either answering questions from departments or coordinating getting answers.	
	Key Responsibility 15 (Career Tracks)			Independently gathers information as needed to perform financial analysis.	Prepares , reviews and/or approves financial transactions. Independently gathers information as needed to perform financial analysis.	
	Key Responsibility 16 (Career Tracks)					
I. Job Knowledge	Develop an understanding of research administration guidelines of Federal and non-Federal sponsors; develop basic knowledge of OMB circulars/Uniform guidance; basic understanding of generally accepted accounting principles, computer and information management systems; introduction to most common sponsored award mechanisms; understanding of compliance requirements related to the use of human or animal subjects in research, financial conflict of interest, biosafety, etc.	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	Advanced understanding of research administration guidelines of Federal and non-Federal sponsors supporting research; maintain current knowledge of compliance regulations in all areas of research administration; Knowledgeable about Federal Acquisition Regulation, Code of Federal Regulations, sponsor-specific policies, intellectual property policy, conflict of interest requirements, publication rights, application of indirect cost rates and other complex concepts in research administration; thorough knowledge in OMB circulars/Uniform guidance; knowledgeable of generally accepted accounting principles; proficiency working with computer and information management systems; experience with all types of award mechanisms, including grants, contracts, subcontracts, cooperative agreements; knowledgeable in applicable compliance requirements related to use of human or animal subjects in research, financial conflict of interest, biosafety, etc; demonstrated expertise in the use of spreadsheet and database software in financial analysis and fiscal	Thorough understanding of research administration guidelines of Federal and non-Federal sponsors supporting research; maintain current knowledge of compliance regulations in all areas of research administration; Knowledgeable about Federal Acquisition Regulation, Code of Federal Regulations, sponsor-specific policies, intellectual property policy, conflict of interest requirements, publication rights, application of indirect cost rates and other complex concepts in research administration; thorough knowledge in OMB circulars/Uniform guidance; knowledgeable of generally accepted accounting principles; proficiency working with computer and information management systems; experience with all types of award mechanisms, including grants, contracts, subcontracts, cooperative agreements; knowledgeable in applicable compliance requirements related to use of human or animal subjects in research, financial conflict of interest, biosafety, etc; demonstrated expertise in the use of spreadsheet and database software in financial analysis and fiscal management	Expert knowledge of research administration policy, regulations and compliance; expert knowledge of OMB circulars such as A-21, A110, A-133, Federal Acquisition Regulations, and principles of cost accounting standards; expert knowledge and experience in research pre-award administration, and proposal preparation/submission processes; expert working knowledge of institutions of higher education fiscal policies/procedures and with Financial Systems; expertise in compliance issues related to research administration and the ability to appropriately interpret policies and regulations; demonstrated expertise to train subordinate staff in policy interpretation and implementation; expert knowledge of external sponsor requirements, such as NSF, DOE, DARPA, NIH, Non-Profits, Industry etc; demonstrated expertise in managing complex financial accounts and funds, including cost projections and budgeting, ability to perform high level financial analysis and customized reporting; demonstrated expertise developing subordinate staff, manage performance, coach for development and develop succession plans; in-depth knowledge of campus operational, personnel, and financial transactions and systems related to administration of contracts and grants; knowledge of industry best practices	

Qualitative Level Cutter

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II. Organizational Development	Develops a basic understanding of the structure and functions of the administrative unit as well as other interacting administrative units; develops a basic understanding of the relationship(s) between the administrative unit and other interacting administrative units; provides feedback after the development of policies and procedures related to the operation of the administrative unit.	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.	Solicits recommendations from within and outside of the administrative unit to improve the structure and functions of the administrative unit as well as the relationship(s) between the administrative unit and other units; composes recommendations for improvements to policies and procedures and presents recommendations to supervisor.	Engages colleagues within and outside of the administrative unit to propose recommendations to improve the structure and functions of the administrative unit as well as the relationship(s) between the administrative unit and other units; reviews, returns or approves recommendations and presents to senior management.	Creates an environment to encourage and develops (preferably online) processes to conduct continuous evaluation and improvement of the structure and functions of the administrative unit; analyzes recommendations submitted for adherence to agency and University policies.
III. Initiative and Independence	Learns the administrative unit's processes for pre- and post-award administration; learns and catalogs resources for obtaining answers to questions regarding duties and responsibilities; meets with PIs to develop understanding of research goals, personnel, and funding agencies.	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.	Utilizes creativity to offer solutions to complex problems; works independently with little required supervision; independently interprets and implements applicable UC, UC San Diego and agency policies, procedures and guidelines.	Engages colleagues within and outside of the administrative unit to discuss best practices for the development of initiative and independence of staff of the administrative unit; recommends changes to the administrative unit's best practices to senior management.	Creates an environment to encourage and develops processes to encourage initiative and independence of staff and provides opportunities to staff; analyzes recommendations submitted by staff for changes to the administrative unit's practices for improvement of staff initiative and independence.
IV. PI and Department Business Office/MSO Relationship	Develops relationships with PIs as well as PIs' department MSOs; learns PIs' primary funding agency(ies); acquaints with PI research personnel; learns fiscal-related practices (procurement, expense reimbursement, etc) of PIs' departments.	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.	Partners with PIs to strategize best paths for maximization of award funds and achieve desired PI outcomes to challenges; ably interprets UC, UC San Diego, and awarding agency policies to predict potential challenges and initiate changes to avoid challenges; communicates the intricacies of research award administration to PIs.	Utilizes thorough understanding of awarding agencies, UC and UC San Diego policies to manage large research programs efficiently and cost effectively; utilizes financial analysis tools (spend rate, trend analysis, etc) to forecast research portfolio status, anticipate challenges and independently initiate changes to address challenges.	Creates an environment to encourage the development of true business partner relationships between fund managers and PIs served; researches staff educational opportunities for relationship building and makes these opportunities available to staff; meets regularly with staff to discuss PI partnership building strategies and subsequently develops best practices.
V. Problem Resolution	Entry level analysis to determine, gather and present data necessary to resolve a problem	Identifies problems that lack apparent solutions and propose to supervisor alternative(s) that may not be readily apparent	Utilizes innovative strategies to identify and recommend solutions within existing programs	Identifies problems that are unique and require application of fresh, "first-time" solutions develops recommendations accordingly on	Creates an environment that encourages thorough understanding of existing policies and development of innovative and effective problem resolutions strategies

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VI. Guidelines Used in Performance of Duties	Follows existing guidelines approved by supervisor in the performance of duties	Identifies inadequacies in current guidelines and recommends alternatives	Identifies inconsistency of inter-dependent variables amongst campus guidelines and recommends alternate solutions to reconcile inconsistencies	Reviews "cradle to grave" guidelines and recommends improvements to increase business efficiency	Solicits recommendations to address inadequacies or inconsistencies of existing guidelines; encourages and fosters work environment that emphasizes continuous examination of guidelines with the goal to improve operations
VII. Innovation and Originality	Does not deviate significantly from established procedures or standards	Develops processes or solutions that utilize innovative or alternate recommendations to existing procedures or standards	Utilizes knowledge gained through work experience to develop and recommend to management innovative solutions to procedures or standards that comply with existing policies	Develops "first time" procedures or standards in response to unique problems	Solicits innovative and original recommendations from subordinates; encourages and fosters work environment that emphasizes innovation and originality in all business practices or standards