

## JOB DETAILS

Date Last Edited:	1/19/2023 6:45:08 PM
*Action Requested:	New Position
Status of Job Description:	Classified
Classified By:	Scott Dinkespiel
Classified On:	1/19/2023
Employee Relations Code:	E-All Others - Not Confidential
System Title (JD form name):	JD-HAAS3-006206-845580
*Position Number:	40133777 SAMPLE
*Employee Name:	Vacant
*Supervisor Name:	Yogi Bear
*Department:	Haas School of Business (HAAS3) <a href="https://haas.berkeley.edu/">https://haas.berkeley.edu/</a>
*Department Summary:	<p>As the second-oldest business school in the United States, the Haas School of Business at the University of California, Berkeley has been questioning the status quo since its founding in 1898.</p> <p>Berkeley Haas is the heart of what's next. We invite you to learn more about Haas, our exceptional faculty members—including two Nobel Prize Laureates in Economics—and our community of dedicated students and alumni. Together, faculty and students create what's next.</p> <p>Our Defining Leadership Principles Our mission is to help extraordinary people achieve great things. At Haas, we live our distinctive culture out loud by embracing our four Defining Leadership Principles: Question the Status Quo, Confidence Without Attitude, Students Always, and Beyond Yourself.</p>
Sub Division:	Haas School of Business (HAAS3)
Division:	Schools (SCHOL)
Job Code:	006206
UC Payroll Title:	RSCH ADM 3 (006206)
Job Category:	Professional
Job Level:	Experienced
Job Family:	Research Administration
Job Function:	Contracts and Grants
Personnel Program:	PSS-Professional & Support Staff
Salary Structure:	Grade 21
Default FLSA Status:	Exempt
Union Code:	99 - Non-Represented
Working Environment:	Campus, medical center or other university setting and various external venues.

## JOB SUMMARY

Working Title:	Research Administrator 3 SAMPLE JD
*Job Summary (Purpose of the Position – please give a brief description of the overall purpose of the position. “Why does this position exist?”)	<p>Involves providing analytical and financial support in proposal processing, contract and grant administration, and budget development, including pre-award proposals initiatives, management of funds post-award, and closeout activities for federal, state, local, and private sponsors. Involves activities associated with forecasting, planning, and managing research portfolios.</p>

### Generic Scope

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.

### \*Custom Scope

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. Works on proposals and awards 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 and awards 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).

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.

Department Role (DR): Typically works on complex proposals such as grants / contracts which require task budgets, option years, multiple investigators and multiple sub awards.

## Key Responsibilities

*Key Responsibilities	*Percentage of Time	*Essential/Not Essential
Department 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. Prepares complex proposal budgets and support documents that are required by proposal guidelines. Provides independent responsibility for post-award financial administration and management for research funds in accordance with campus policy and agency requirements. Maintains compliance with regulations, terms, and conditions; financial management and reporting; and sub-award/subcontract issuance and administration.	40%	Essential
Coordinates proposal/amendment submissions: 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. Researches, develops and implements new research initiatives. Provides analytical and financial support in proposal processing, contract and grant administration, and budget development, including pre-award proposals initiatives, management of funds post-award, and closeout activities for federal, state, local, and private sponsors. Provides guidance and counsel on complex research administration matters, including compliance regulations, to principal investigators and department administrators, and less experienced department staff. Ensures complete and accurate collection of documentation for financial transactions. Assists in support of audit as directed by senior staff.	20%	Essential
Previews pre-award update information requested by sponsor representatives before issue of awards and submission. Develops professional relationships with sponsor representatives to identify funding opportunities in compliance with stated requirements. Delivers specialized training for education workshops in the area of research administration, grant writing, proposal development to improve funding success. Authorizes establishment of complex contract and grant fund accounts with approval of other analysts, director or other authorized institutional official. Reviews and approves or rejects requested fund advance setups or research account updates. Negotiates terms and conditions of complex research agreements and awards from various sponsors.	15%	Essential
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	10%	Essential

## Key Responsibilities

*Key Responsibilities	*Percentage of Time	*Essential/Not Essential
<p>data from the general ledger for the collection of information, preparing summary schedules, and either answering questions from departments or coordinating getting answers.</p> <p>Forecasting, planning, and managing research portfolios by performing some or all of the following:</p> <ul style="list-style-type: none"> <li>coordinating and identifying and developing and/or presenting proposals, and contracts; reviewing proposals to ensure UC compliance</li> <li>Negotiates, administers, and monitors contract and grant awards.</li> </ul> <p>Reports directly to the Manager, Grant Administration</p> <p>Assists senior leadership for Research in formulating policies / procedures to administer changes.</p> <p>Makes independent decisions regarding acceptance of projects by the organization. Independently gathers information as needed to perform financial analysis. Prepares journal entries; maintains and reconciles ledger accounts.</p> <p>Requests and reviews revised budgets and reviews awards and projects for compliance requirements.</p> <p>Prepare, review, and approve financial transactions.</p>	5%	Essential
<p>Independently gathers information as needed to perform financial analysis.</p> <p>Ensure the accuracy and timeliness of invoicing and collection of subcontract payments.</p>	5%	Essential
<p>Professional and career development to stay update with latest trends and business practices related to research administration.</p>	5%	Essential

## KNOWLEDGE, SKILLS AND ABILITIES

*KSAs	*Required/Preferred
Thorough understanding of research administration guidelines of Federal and non-Federal sponsors supporting research and educational activities, preferably in a university environment.	Required
Thorough knowledge of applicable compliance requirements related to the use of human or animal subjects in research, financial conflict of interest, biosafety, etc.	Required
Ability to manage a significant volume of transactions to multi-task, prioritize and troubleshoot.	Required
Ability to complete multiple, competing tasks and deadlines with a high degree of accuracy.	Required
Ability to perform complex financial analysis and customized reporting.	Required
Demonstrated competence in the use of spreadsheet and database software in financial analysis, fiscal management, and financial reports.	Required
Experience with budget development, long-range forecasting, and accounting practices.	Required
Ability to maintain independent judgment; strong organization and communication skills; and a customer service focus across broad and diverse subject areas.	Required
Maintains current knowledge of compliance regulations in all areas of research administration.	Required
Demonstrated knowledge of generally accepted accounting, fiscal, and reporting principles.	Required
Demonstrated knowledge of effective grant funding processes, procedures, and techniques	Required
Strong writing skills in a variety of styles to draft persuasive text for a variety of audiences while ensuring adherence to funding sponsor's guidelines.	Required
Ability to work independently and as part of a team and ability to manage within a diverse work environment.	Required
Requires strong analytical skills and must be detail-oriented.	Required
UC Berkeley fiscal system experience	Preferred

## EDUCATION

Education Level	Required/Preferred
Bachelor's degree in related area and / or equivalent experience / training	Required

## BUDGETARY RESPONSIBILITIES

Type of Budget	Amount	Notes
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Total Budget	\$0	
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## SUPERVISION

*Level of Supervision Received	General Supervision
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### Description

Indicates that the incumbent develops procedures for performance of variety of duties; or performs complex duties within established policy guidelines.

## APPOINTMENT DETAILS

*FTE:	1.00
*Employee Class:	Staff: Career
Working Days:	Monday; Tuesday; Wednesday; Thursday; Friday
Working Hours:	8am - 5pm
Work Location:	On Campus, Hybrid, or Fully Remote

## \*PROBLEM SOLVING EXAMPLES

### Common problems solved by this position:

Example #1:	Create a departmental worksheet for domestic and international travel reimbursements and for non-payroll expenses; create Excel driven timesheet used by the department.
Example #2:	Create a departmental worksheet for keeping track of the cost limits of departmental speakers.
Example #3:	Create reports for PIs to make spending, costs, and projections of their available funds clearer.

### Less frequent and more complex problems solved by this position:

Example #1:	Supervise an individual who repeatedly challenges instructions and suggestions.
Example #2:	Submit a multi-PI, multi-institution grant proposal but encounter difficulties when contacting PIs to get the required information.
Example #3:	Coordinate fund source changes across multiple departments.

### Problems or situations that are referred to the supervisor of this position:

Example #1:	Resolve problems created by personnel who refuse to acknowledge or comply with campus/agency policy and guidelines
Example #2:	Resolve problems in overhead created by the campus incorrectly charging the fellowship fund. Work independently with EFA to attempt to resolve but refer to supervisor when this failed.
Example #3:	Faculty made a commitment to a visiting scholar that was not possible to meet given campus/agency requirements. Work with faculty and funding agencies to

resolve the situation to provide promised compensation without violating campus/agency rules.

## \*PHYSICAL ENVIRONMENTAL AND MENTAL REQUIREMENTS

### PHYSICAL DEMANDS

A thorough completion of this section is needed for compliance with legal standards such as the Americans with Disabilities Act. The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Physical Requirements	Never 0 Hours	Occasional Up to 3 Hours	Frequent 3 to 6 Hours	Continuous 6 to 8+ Hours	Is Essential
Sitting		X			X
Standing		X			
Walking		X			
Squatting	X				
Bending	X				
Waist Twisting	X				
Kneeling	X				
Crawling	X				
Body positions other	X				
Climbing stairs		X			
Climbing ladders	X				
Climbing other	X				
Reaching overhead		X			
Reaching shoulder height		X			
Reaching below shoulder height		X			
Lifting 0-20 lbs. below waist		X			
Lifting 21-30 lbs. below waist		X			
Lifting 31-60 lbs. below waist	X				
Lifting over 60 lbs. below waist	X				
Lifting 0-20 lbs. above waist		X			
Lifting 21-30 lbs. above waist	X				
Lifting 31-60 lbs. above waist	X				
Lifting over 60 lbs. above waist	X				
Lifting up to 0-20 lbs. overhead		X			
Lifting up to 20-30 lbs. overhead		X			
Lifting over 30 lbs. overhead	X				
Carrying 0-20 lbs.		X			
Carrying 21-30 lbs.		X			
Carrying 31-60 lbs.	X				
Carrying over 60 lbs.	X				
Pushing 0-20 lbs.	X				
Pushing 21-30 lbs.	X				
Pushing 31-60 lbs.	X				
Pushing over 60 lbs.	X				

## PHYSICAL DEMANDS

A thorough completion of this section is needed for compliance with legal standards such as the Americans with Disabilities Act. The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Physical Requirements	Never 0 Hours	Occasional Up to 3 Hours	Frequent 3 to 6 Hours	Continuous 6 to 8+ Hours	Is Essential
Pulling 0-10 lbs.	X				
Pulling 11-25 lbs.	X				
Pulling 26-50 lbs.	X				
Pulling 51-75 lbs.	X				
Pulling over 76 lbs.	X				
Fine finger manipulation				X	
Gross manipulation	X				
Simple grasp				X	
Power grasp	X				
Repetitive hand/arm use				X	

## ENVIRONMENTAL REQUIREMENTS

While performing the duties of this job, the associate is required to work within the selected working environments.

Exposures	Never 0 Hours	Occasional Up to 3 hours	Frequent 3 to 6 hours	Continuous 6 to 8+ hours	Is Essential
Loud noise	X				
Moving machinery	X				
Background noise		X			
Dim or bright lighting		X			
Dust, fumes or gases	X				
Marked changes in temperature	X				
Marked changes in humidity	X				
Chemicals or toxic substances	X				
Latex	X				
Radiation	X				
Microwave	X				
Combative patients	X				
Works in confined quarters	X				
Exposures other	X				
Ability to differentiate color		X			
Operating motor vehicles	X				
Operating motorized equipment	X				
Use of protective equipment	X				
Miscellaneous other	X				

## MENTAL DEMANDS

While performing the duties of this job, the associate is required to work within the selected working environments.

	Never 0 Hours	Occasional Up to 3 hours	Frequent 3 to 6 hours	Continuous 6 to 8+ hours	Is Essential
Read/Comprehend				X	X
Write				X	X
Perform calculations			X		X
Oral communication			X		X
Reason and analyze		X			X
Mental demands other	X				X

## Job Standards Special Conditions

	Required/ Preferred
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## \*REPORTING REQUIREMENTS AND CRITICAL POSITIONS

- CANRA (U13): Mandated Child Abuse Reporter
- Clery Act (U15): Campus Security Authority
- Credentials Verification (U06): For clinical practitioner
- Criminal history check (U02): Satisfactory criminal history background check
- DMV Pull Program: Must enroll in the DMV Pull-Notice Program
- Driver's License (U08): Must maintain valid CA DL and clean DMV record
- Form 700 (U16): Statement of Economic Interest Filer
- Other special conditions of employment
- None of the above are applicable to this position

## \*ESSENTIAL ELEMENTS OF CRITICAL POSITIONS

- Possession of building master keys for access to residences, offices, or other facilities.
- Direct responsibility for the care, safety and security of people, including children and minors, or property, including personal and University.
- Direct access to or responsibility for controlled substances (as defined in BFBBUS-50); access to certain high risk hazardous chemicals, biological or radioactive/nuclear materials for which background checks are required by federal or state regulations or access to any other hazardous material specifically designated by the UC Executive Director of Environmental Health and Safety.
- Direct access to and/or responsibility for protected, personal, or other sensitive institutional information, including information on students, faculty, staff, or other University constituents, and IT resources that process, transmit or store restricted or sensitive institutional information.
- Responsibility for operating commercial vehicles, machinery or toxic systems that could result in accidental death, injury or health problems.
- A requirement for a professional license, certificate, or degree, the absence of which would expose the University to legal liability and/or negative public reaction.
- Direct access to and/or responsibility for information affecting national security.
- Direct access to or responsibility for cash, cash equivalents, checks, or University property, disbursements or receipts (as defined in BUS-49, Section III.C.).
- Authority for committing the financial resources of the University through contracts or agreements.
- Position requires annual filing of State of Economic Interests (Form 700).
- None of the above are applicable to this position.

Employee Name	
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Employee Signature	
Employee Date	
Supervisor Name	
Supervisor Signature	
Supv Date	
Department Head Name	
Dept Head Signature	
Dept Head Date	