UC San Diego Research Administration Training Program

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Office of Research Affairs

Topics

Purpose

The purpose of this project is to create a comprehensive enterprise-wide research administration educational certification program that establishes and maintains individual and organizational learning and knowledge about research administration topics, programs and systems.

Objectives

Knowledge Acquisition

Skills Acquisition

Problem Solving and Affective Learning (Behavior)

Talent Retention

Professional Growth and Development

Justification (Problem)

UC San Diego sponsored research funding surpassed $1 billion in 2010. This growth in volume and complexity has led to increased scrutiny and demand for accountability from constituencies and federal sponsors, while under pressure to maintain or reduce administrative costs.

Lack of coordinated and centralized training options isproblematic because:

➢ *Department training resources and expertise may vary leading to inconsistent training practices across departments*

➢ *Gaps in staff training may lead to costly transactional and budgetary mistakes*

➢ *Greater audit risk due to mistakes and lack of consistent training*

➢ *Could suffer loss of funding due to bad audit findings and loss of UC reputation*

See the RA Training Paper, Summary and Research

Justification (Solution)

Inefficient for departments to create and maintain their own separate sets of training materials that may not be consistent with federal and UC policies and best practices. Current practices are not meeting needs. UC San Diego needs a coordinated research administration training program to address and meet the institution's needs.

By offering a cohesive certification program it:

➢ *Reduces cost and administrative burden on departments and central offices from having to develop and maintain it*

➢ *Avoids duplicative and conflicting information*

➢ *Minimizes subject matter expert (SME) resource drain/over allocation*

➢ *Managed by a training and development professional*

See the RA Training Paper, Summary and Research

Managing Expectations

Deliverables / Scope

All trainings should have a direct correlation with research and research administration

Short term and long term approach so immediate needs can be met while allowing time to scale the program to meet long term objectives

Mitigate scope creep while still offering immediate deliverables

Out of Scope

General software skills training (Microsoft Word, Excel, Outlook, etc.)

General professional development (leadership, change management, supervisory training, etc.)

General mandatory compliance based training (sexual harassment, cyber safety, etc.)

Deliverables / Scope – Long Term

Research Administration Training Program

Department	Central Office

Fund Manager (or equivalent)	MSO/DBO (or equivalent)	PI	OCGA	HSSPPO	SIO-OCGA	OPAFS	Other

General Campus	SIO	HS	General Campus	SIO	HS

Deliverables / Scope – Short Term

Research Administration Training Program							
Department				**Central Office**			
Fund Manager (or equivalent)	MSO/DBO (or equivalent)	PI	OCGA	HSSPPO	SIO-OCGA	OPAFS	Other
General Campus / SIO / HS	General Campus / SIO / HS						

General Information

Will cover Pre-Award, Post-Award, Compliance, Tools and Systems

Align with Sponsored Projects Lifecycle

Will be applicable to all VCs Areas

Will leverage and collaborate with existing UCSD training content and materials

Will leverage exisiting external resources (i.e. NCURA, etc.)

Aligns with HR Career Tracks for Sponsored Research Administrators, Individual Development Plans and Learning Road Map
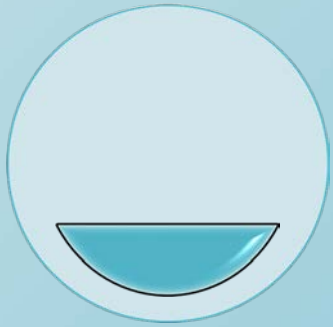

Image from University of Michigan

Fund Manager Training Module

## 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)	*Research Administrator, Specialist 1*	*Research Administrator, Specialist 2*	*Research Administrator, Analyst*	*Research Administrator, Senior Analyst*	*Contract and Grant Manager 1*
Job Level (Career Tracks)	Entry				Expert
Education (Career Tracks)	Bachelor's degree in r and/or equiva experience/trai				Bachelor's degree in related area and/or experience
Generic Scope (Career Tracks)	Entry-level professional or no prior experience; l professional concepts to problems of limited scop complexity; works on de assignments that are ini in nature, requiring limit and decision making.				me (50% or more) objectives through the ts of subordinate staff. l goals and objectives, r. Manages the rdship of human, ical resources in nental and organizational ures subordinate onals adhere to defined es systems and partmental assets.
	Develops and/or overse proposals, awards and/c transactions related to c grant management and contract and grant recor compliance with institut research sponsor policie				the form of objectives use resources to meet views and approves nctional programs. ordinates to achieve established policies.

Request Summary

JOB DESCRIPTION NO	VERSION	PREVIOUS JD NO	POSITION CONTROL NO
302989	**1**		**1**

DEPARTMENT
VC-ACADEMIC AF

REASON FOR REQU
Recruitment for a

INCUMBENT NAME
New Position

CURRENT TITLE

REQUESTED TITLE
ADMIN SPEC

BACKGROUND CHE
Yes

SUPERVISOR NAME

Department Clas

DEPARTMENT CLAS
Ross, Steven M.

APPROVED TITLE
ADMIN SPEC

EFFECTIVE DATE

DEPARTMENT CLAS

IMPORTANT INF

This job descripti
sponsored resea
by the EVC area
coordinated by C
departments to a

	Research Administrator, Specialist 1			
	Based on job card #302989			
Research Administrator, Specialist 1 Name:				
Start Date:				
Supervisor's Name:				
	Pre-Award Processes			
Main Process	**Detailed Process**		Date Assigne	Date Mastered
Pre-Award Applications - All Sponsors & Proposal Types	Proposal Request			
	Budget			
	Internal Forms excluding PI Exception			
	Internal Forms - PI Exception			
	Sponsor Form Completion			
	JIT (Just in Time)			
Pre-Award Clinical Trials	PI Initiated			
	Sponsor Initiated			
Pre-Award Confidential Disclosure Agreement (CDA) Process Application	Internal Form			
Pre-Award LSA	Proposal D&A VCHS Bus Con			
Pre-Award Material Transfer Agreement (MTA) Process	Application/Internal Form			
Pre-Award PA Process	VMRF Packet			
Pre-Award IPA Process	Process VA Packet			
Pre-Award Sub Contract (UCSD Prime - UCSD is giving $)	Application Proposl Request including Budget for all sponsor types			
Pre-Award Sub Contract (UCSD Subprime - UCSD is reciving $ from a sponsor)	Complete Internal Forms			
	Complete Sponsor Application Forms			
	JIT (Just in Time)			

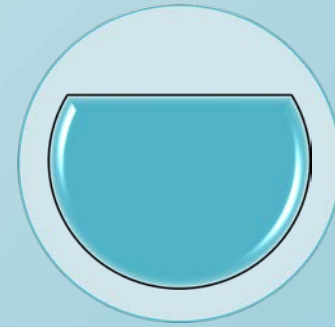*rch Administrators*

Fund Manager Training Module

Level 1: Basics

- No Pre-requisites
- Core Competencies Coursework
  - Class 1
  - Class 2
- Electives
  - Class 1
  - Class 2
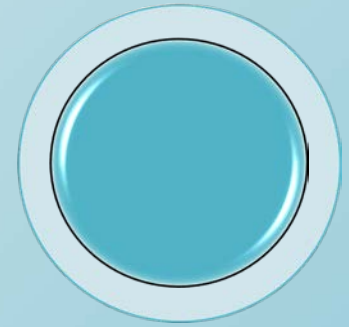- Certificate of Completion
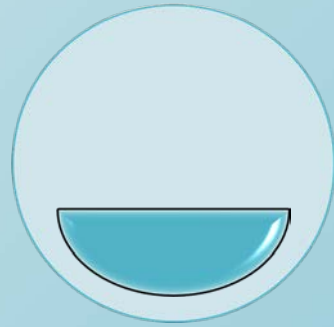
Level 2: Intermediate

- Pre-requisite (Level 1)
- Core Competencies Coursework
  - Class 1
  - Class 2
- Electives
  - Class 1
  - Class 2
- Certificate of Completion

Level 3: Experienced

- Pre-requisite (Level 1 & 2)
- Core Competencies Coursework
  - Class 1
  - Class 2
- Electives
  - Class 1
  - Class 2
- Certificate of Completion

Level 4: Advanced

- Pre-requisite (Level 1, 2 & 3)
- Core Competencies Coursework
  - Class 1
  - Class 2
- Electives
  - Class 1
  - Class 2
- Certificate of Completion

*Materials and assessments will correspond as needed
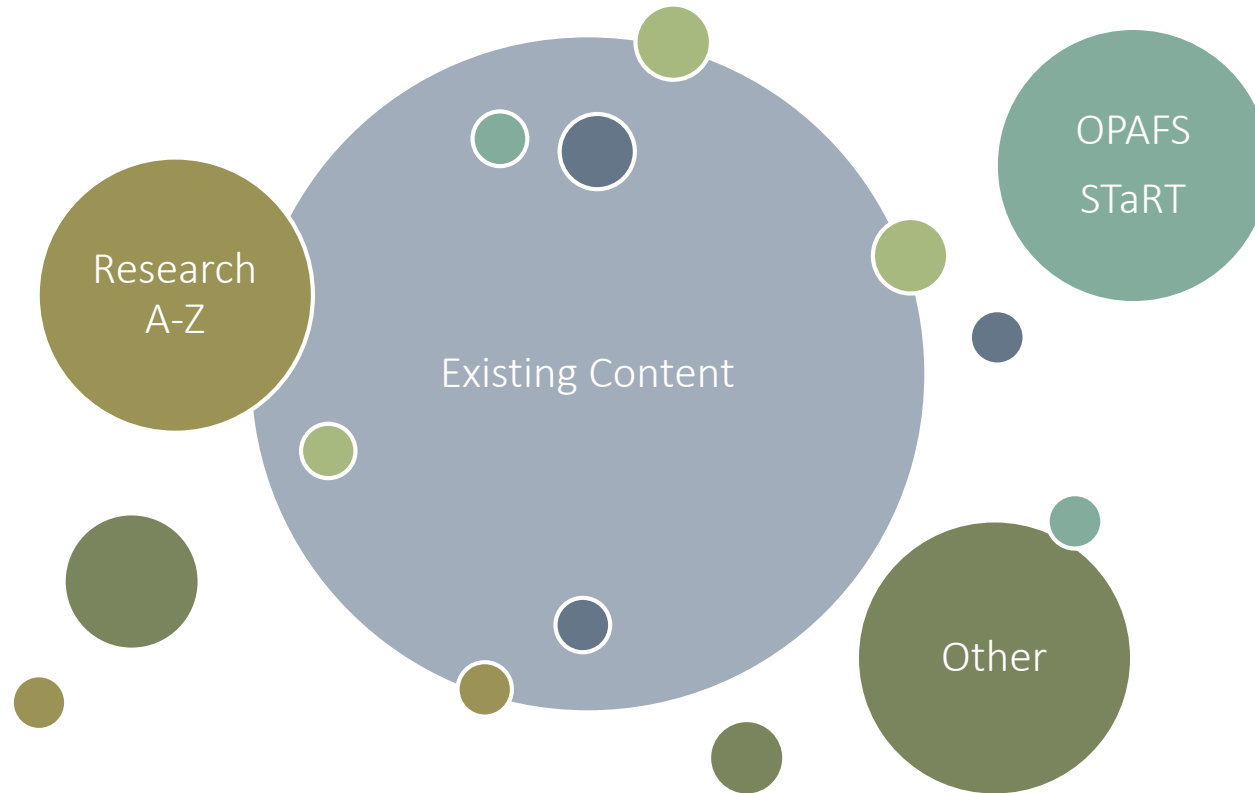
Fund Manager Training Module

RA Training Program Logo Here

Completion of all 4 Levels =
UC San Diego
Sponsored Research Administrator Certification

Current RA Training

Research A-Z

Existing Content

OPAFS STaRT

Other

Training and Development Models

Successive Approximation Model (SAM) for overall project management

Curation Model to apply and leverage existing content
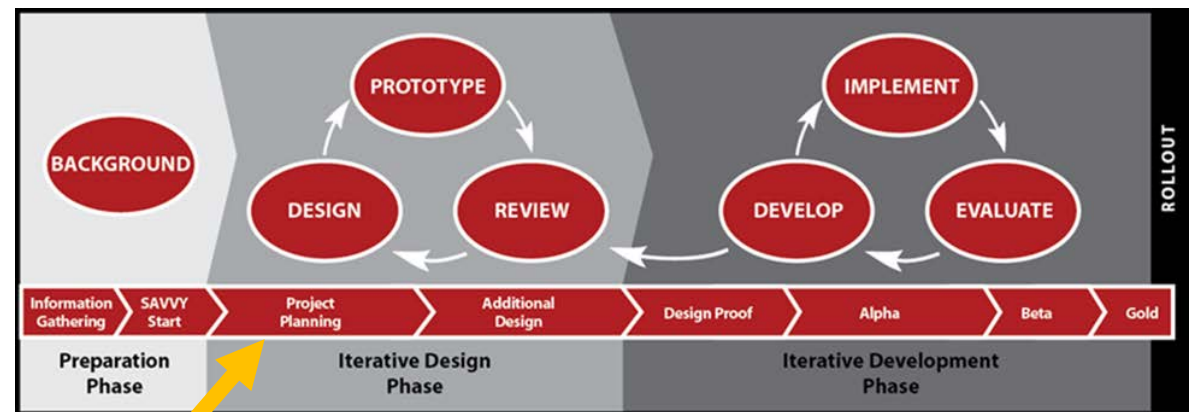
Kirkpatrick's Model for evaluation

Image from Michael Allen's book Leaving ADDIE for SAM slide share

We Are Here

Blended Learning Solution

Active Teaching Methods

Teaching Others (90%)
(application of real situation)

Practice Doing (75%)

Discussion (50%)

Passive Teaching Methods

Demonstration (30%)

Audio-Visual (20%)

Reading (10%)

Lecture (5%)

Blended Learning Solution

Instructor Led

mLearning

Simulation

Coaching

Mentoring

Training 'on the job'

Self-Study (e.g. books, videos)

Cross Training

Case Studies

Job Aids

Handouts

Online Reference Materials

Manuals

Assessment

Evaluation
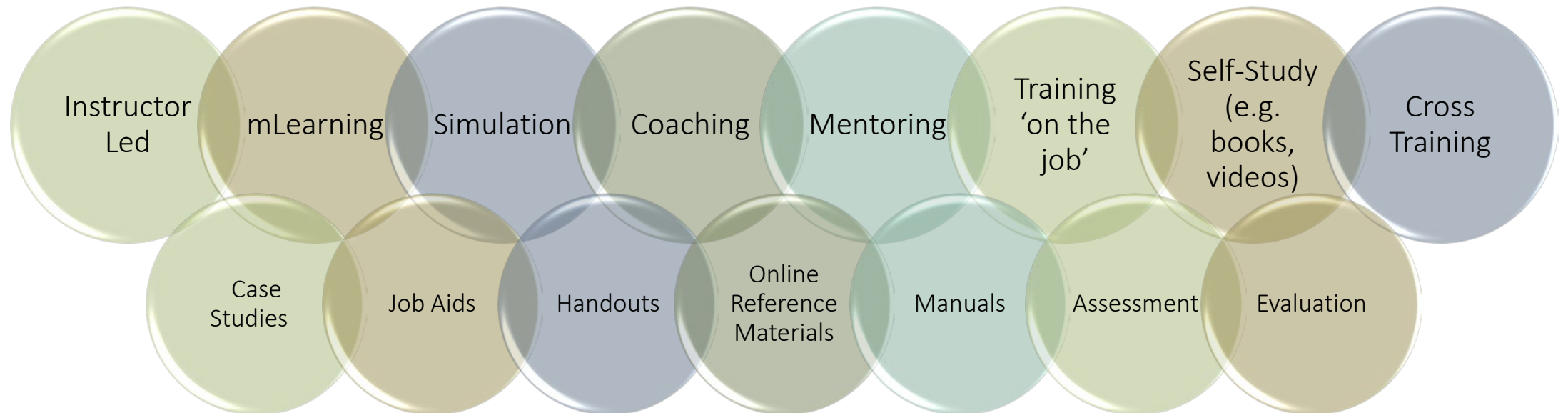
Measuring Success

Results   Links training to business and organizational performance

Behavior   Observation or Interview, may involve support from manager or supervisor

Learning   Assessment or test before and after training

Reaction   "Happy Sheets" immediately after training

Based on Kirkpatrick's Model Four Level Evaluating Program

Resources

Work Group made of subject matter experts (SMEs) to assist with the creation, coordination and implementation of deliverables.

This group will be made up of the following representatives:

➢ All three VC areas (General Campus, SIO and Health Sciences)

➢ Departments, ORUs and Central Offices

➢ Fund Managers and MSO/DBO/CAOs (and/or equivalent positions), preferably members of either ORUBA and/or ABA

➢ At least one HR representative

➢ Primary areas of Academic Affairs (i.e. Physical Sciences, Social Sciences, Biological Sciences and Engineering)

Note broader audiences may be engaged in other capacities and further in the future as the program develops

Resources

Name	Title	Department
Nicole Joyce (Chair)	Research Admin Training Program Manager	Office of Research Affairs (ORA)
Jennifer Louie	Sponsored Project Manager	Div of Biological Sciences
Maryam Attari	Chief Financial Officer/ Assistant DBO	Div of Biological Sciences
Anton Del Rosario	Fund Administrator	Mechanical/Aerospace Engineering
Nancy Lee	Business Office Manager	CALIT2
Jasmyn Hornbuckle	Research Administrative Analyst	Physical Sciences
Brianne Decker	Senior Admin Analyst-Supervisor	VCHS Research Service Core
Fernando Mares	Financial Manager	Medicine
Janet Matsumoto	Financial Manager	IGPP/GRD
Rachel Sievert	Assistant Director	OCGA
Wella Garcia	Div. Senior Award Accountant	OPAFS
Judy Cheng	Principal Contract/Grant Officer	SIO-OCGA
Stacey McDermaid	Senior HR Analyst	VC Research

Systems and Tools

➢**Blink** - Campus Management System (CMS)

➢**UC Learning** a.k.a. Sum Total - Learning Management System (LMS)

➢**Captivate** or other - Mobile Learning Software

➢**SharePoint** - Internal Project Management/Collaboration Site and Document Repository

➢**MS Office** - including MS Project and Visio to produce deliverables

➢**Adobe Photoshop** - Image editing and creation

➢**Readytalk** -for remote conferencing

➢**Skype for Business** - for remote collaboration

➢**Others** - tools such as interactive polling software, eLearning gamification templates and more may be used on an as-needed basis

Project Risks

Resources

Timeline for Deliverables

Scope/Prioritization

Jurisdiction

Change Management

Trying to align with best practices not just "the way we have always done things"

Will use Prosci A.D.K.A.R. model:
➢ Awareness
➢ Desire
➢ Knowledge
➢ Ability
➢ Reinforcement

Sponsored By…

Office of Research Affairs

➢ Marianne Generales, Assistant Vice Chancellor of Research

➢ Sandra Brown, Vice Chancellor of Research

Affiliate Sponsorship

➢ [Standing Committee on Service and People Oriented Administrative Culture (SC-SPOC)](#)

➢ [Organized Research Unit Business Administrators (ORUBA)](#)

➢ [Academic Business Administrators (ABA)](#)

Summary

The goal is to make this a world class RA certification program that echoes the prestige of UC San Diego and the $1 billion a year research effort it supports and set the tone and example in order to be a leader that others will look to as best in class.

For more information…

Visit:

http://blink.ucsd.edu/go/ra-training

Contact:

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