



BCGEU POSITION DESCRIPTION

POSITION TITLE: Research Services Specialist

JOB NUMBER: 543

REPORTS TO: Research Administration and Services Manager

INCUMBENT:

DEPARTMENT: Office of Research Services (ORS)

DATE CREATED: December 2020

JOB CLASS: 13

DATE REVISED: September 16, 2024

PRIMARY FUNCTION

The Research Services Specialist works closely with all researchers in the efficient post-award administration of their externally funded research projects, ensuring the projects are administered in alignment with funding agency guidelines. Provides detailed and timely reports to senior administrators on the status of institutional research funding. Communicates with external funding agencies to ensure KPU's research administration practices and procedure are updated as and when funding agencies revise their guidelines. Acting as the primary liaison between KPU administrative units and researchers, facilitating the smooth operation of research projects. This position requires a broad and detailed knowledge of institutional and external funding agency policies and procedure as well as knowledge and competency in research finance. The candidate must be detail-oriented, able to meet tight deadlines, and capable of making sound recommendations with minimal supervision.

JOB DUTIES AND TASKS

1. Monitors the university's post award phase of external and internal research funds with a focus on risk mitigation strategies that include identifying and analyzing the risk, rate and prioritize the risk, create detailed audit trails and maintain transparency in communications;
2. Performs informal mid-project audits and reconciliation of research grant accounts; monitors research related purchase card transactions, capital expenditures, payroll reports and receivables to ensure accuracy and timely follow-up;
3. Prepare presentations and presents student funding programs to students in class;
4. Composes grant letters detailing award funding and eligible expenses to advise applicants, administration and divisions/departments of the status of applications;
5. Provides consultation, coaching, mentorship and assistance to staff (Office of Research Services and Finance Office) and students about the pre-award and post-award workflow, policies, and adherence of external funding agency guidelines and internal procedures;
6. Leads training and aids researchers and staff in the use of ROMEO (research administration system). Support researchers in setting up project accounts, uploading documents and facilitate the approval process. Serves as the KPU coordinator for ROMEO, liaise with the vendor for technical issues and updates; Calculates and prepares quarterly indirect cost allocations for processing through Financial Services;



7. Monitors research expenditures and reviews and analyzes research financial information of assigned grant funded internal and external programs for researchers that includes restricted and unrestricted funds;

Provides advice and guidance to researchers on expense eligibility, internal and external funding guidelines, as well as compliance and reporting requirements;

8. Prepares and reviews research purchase orders, web requisitions and expense claims to ensure applicability and correct expense coding. Verify appropriate back-up provided and ensures compliance with KPU policy, as well as external funding agency policies;
9. Coordinates and supports the preparation of Employee Transfer Forms (ETFs), award letters (student research assistant appointments, faculty release, etc.), and institutional reports to funding agencies.;
10. Completes detailed financial surveys of research activities at KPU to external agencies;
11. Orients new faculty and student researchers via the Researcher Checklist that includes review of KPU policies and procedures, external funder guidelines and funding management requirements;
12. Creates videos and other training resources;
13. Liaises with various stakeholders on behalf of the ORS;
14. Administers the research database software, including training staff members, develops, updates and maintains Drupal and creates content for the ORS SharePoint site;
15. Trains faculty on research administration web application (i.e., Romeo) regarding accessing grant information, applying for internal grants using on-line application forms, and accessing progress/completion reports and data gathering forms;
16. Develops and initiates changes to administrative procedures (SOPs) for consideration and implementation by the Director, Research, Innovation, Scholarship and Entrepreneurship Services.
17. Monitors expenses and tracks financial transactions and accounts via the in-house accounting program and communicate with Finance for clarification and adjustments;
18. Processes expense reports and purchase requisitions;
19. Records minutes of meetings, transcribes and distributes to members of committees and any other related staff, faculty, or administration;
20. Acts as a backup for the Research Ethics Coordinator and Manager, Research Administration and Services Manager, as needed;
21. Coordinates divisional events, conferences and workshops, prepares guest lists/registration, including the creation of on-line registration forms;
22. Contributes to and promotes a safe, respectful, and inclusive work environment by adhering to Universities policies and procedures and completing mandatory training programs;
23. Performs other related duties as assigned.



SUPERVISION RECEIVED:

This position reports to the Research Administration and Services Manager.

SUPERVISION/DIRECTION EXERCISED:

none

PHYSICAL ASSETS/INFORMATION MANAGEMENT:

Maintains and updates departmental filing systems.

FINANCIAL RESOURCES:

- a. Monitor and approve expenses. Track financial transactions;
- b. Reconciling grant funding accounts;
- c. Monitoring budgets and actuals;
- d. Authorize expenses up to an established limit based on signing authority and contractual agreements;
- e. Audit award accounts to ensure compliance.

The above statements reflect the general details considered necessary to describe and evaluate the principal functions of the job identified, and shall not be construed as a detailed description of all the work requirements that may be inherent in the job.

EMPLOYER REQUIRED KNOWLEDGE SKILLS AND ABILITIES

- Working knowledge of all research administration and compliance (e.g. research ethics, animal care etc.) over the entire life cycle of research activities;
- Demonstrated ability to coordinate financial activities and to monitor compliance with policies and agreements;
- Demonstrated ability to perform advanced Microsoft Office and Internet applications;
- Ability to key 40 wpm with a high degree of accuracy;
- Experience with content management systems;
- Demonstrated initiative, organizational, and decision-making skills;
- Demonstrated ability to work independently and as a team member;
- Superior communication skills, including excellent oral and written skills;
- Working knowledge of institutional policies, funding agency policies, and program guidelines;
- Proven ability to manage and prioritize tasks, meet changing priorities, work to deadlines, and make responsible decisions while maintaining high levels of customer service;
- Flexible in scheduling as overtime and out-of-town travel may be required;
- Proven ability to handle confidential matters and materials with tact and discretion.

EMPLOYER REQUIRED EDUCATION & EXPERIENCE

- Minimum of five years of administrative experience plus two years of post-secondary education, preferably Research Administration certification, and/or business or administration courses or credential or an equivalent combination of education training and experience;
- Experience working in a research administration environment required.



Knowledge Skills & Abilities revised:
