

JOB TITLE: Senior Manager, Institutional Research **DATE:** 01-Nov-2013
REPORTS TO: Director, Institutional Research
JOBS REPORTING: Grants and Contracts Manager, Institutional Research
DEPARTMENT: Office of Research
LOCATION: Main Campus
USG: 12

PRIMARY PURPOSE:

The Senior Manager, Institutional Research is responsible for managing the relationships between research stakeholders, within the University and externally, to: A) promote funding opportunities and facilitate research proposal preparation and submission, B) mitigate risks to the University with respect to funded research projects within the portfolio by i) developing models for contracts and agreements where none exists, and/or ii) negotiating terms for research grants and contracts, and C) work with stakeholders to improve work processes.

KEY ACCOUNTABILITIES:

1	<p><u>Communication and Relationship Building</u></p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> • Provide outreach activities, both one-on-one and via workshops; coordinate and organize sponsor visits/workshops; take leadership role to provide guidance to faculty on possible suitable funding sources, both face-to-face through presentations and through regular email updates. Execution of responsibilities associated with the pre-award activities requires regular interaction with funding agency personnel, knowledge of the sponsor's focus, objectives and expectations as well as guidelines and policies; and interaction with faculty members to support preparation of applications for research funding. • Institutional point of contact for specific programs within the portfolio, which requires proactive engagement of Program Managers and Administrators within sponsor organizations, administrative contacts within partner institutions and all relevant stakeholders across campus. • Communicate regularly with sponsoring agency officials regarding program guidelines to ensure that the Office of Research has the most recent information and that the interpretation of guidelines transmitted to uWaterloo researchers is complete, current and accurate. Advise Department Chairs, School Directors and Faculty Deans and researchers on new guidelines and other information critical to funding programs within the portfolio. • Attend meetings on and off the University campus with agency representatives, government officials and/or researchers, and prepare written and make oral presentations as required. Examples of presentations include those pertaining to competitions, changes in sponsor guidelines, preparation of progress reports or finalization of award agreements, and responses of agencies to University applications. • Organize, administer and participate in ad hoc committees as needed for research activities. • Prepare non-routine reports required by the Vice-President, University Research, the Associate Vice-President, University Research, the Director, Institutional Research, and other university administrators using various data sources including InfoEd. The incumbent is expected to design and generate specific reports from generalized requirements provided by the requester. • Undertake special projects (e.g., preparation of financial reports, analysis of program data, sponsor surveys) as assigned by the Vice-President, University Research or the Associate Vice-President, University Research or the Director, Institutional Research. • Handle general research-related inquiries within the portfolio as needed.
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Job Analysis Interview Questionnaire

2	<u>Facilitate research proposal preparation and submission</u> <ul style="list-style-type: none"> • Provide expert advice, working with researchers in all six faculties, to develop government-sponsored research funding proposals and complete applications for funding that are of high quality and internationally competitive, often with industrial and multi-institutional partnerships. This includes budget development to ensure: compliance with University policies and application guidelines set by the sponsor; adherence to submission requirements (e.g. format, electronic submissions where appropriate, matching fund requirements and deadlines); reviewing for clarity, impact and typographical or grammatical errors; compliance with eligibility and reporting requirements; and identifying contractual terms that might bind the university and researchers, mitigating risk as appropriate.
3	<u>Develop models for contracts and agreements, internal SOPs</u> <ul style="list-style-type: none"> • Develop NEW models and/or update existing templates for programs within the portfolio including but not limited to sample applications, grant agreements, contracts, strategic Memoranda of Understanding (MOUs), Non-Disclosure Agreements (NDAs) or inter-institutional agreements. • Participate in core team meetings to develop consistency among Office of Research groups including development and/or updating of standard operating procedures (SOPs) used for daily workflow.
4	<u>Negotiate terms for government research grants and contracts</u> <ul style="list-style-type: none"> • The Senior Manager, Institutional Research has the authority to negotiate terms for research grants and contracts and to commit the University to such work through delegated signing authority. This includes being a signatory on Office of Research Cover Sheets, funding proposals and research agreements pertaining to single transactions of up to \$500,000 CAN. • A significant number of agreements, sub-grant agreements, sub-contracts and amendments are also negotiated and executed on a regular basis, ensuring that all relevant details / support documents are included and compliant with agency requirements and University policies. Agreement negotiations can involve multiple institutions, are time-consuming and require negotiating skills and significant knowledge of legal implications (employment and salary terms including graduate student participation, university liability, indemnity, licensing and patent rights / intellectual property protection), financial responsibilities (commitments including indirect cost guidelines), publication, insurance, conflict of interest issues, and federal legislation (e.g., Freedom of Information and Protection of Privacy Act). Negotiate with the Sponsor on conflict areas as required. • Select and negotiate the appropriate agreement template for each research project. Prepare and submit, on behalf of the University and faculty member, specific requests for amendments to agreements such as date extensions, budgetary reallocations and correspondence to external sponsors in order to ensure effective performance and monitoring of research projects. Such requests may be initiated by the incumbent, the sponsor or by the principal investigator. • Post-award responsibilities include: providing or coordinating proper institutional signature for execution of agreements and amendments; managing the terms and conditions of the agreements by monitoring the activity, and providing reminders, information and reports as required to faculty, research finance and sponsors; preparing, negotiating and managing sub-award agreements and amendments with other universities and research institutions; and negotiating and executing non-disclosure agreements, material transfer agreements, master agreements, and other research-related agreements when required. These agreements can reach multi-millions of dollars in value and be multi-institutional in scope.
5	<u>Improve work processes</u> <ul style="list-style-type: none"> • The Senior Manager, Institutional Research identifies gaps, in particular in relation to contract templates, identifies inefficiencies with respect to how research projects are managed and provides solutions to improve efficiencies, reduce duplication of work and reduce risks. Solutions may include documents such as process flow diagrams identifying roles and responsibilities, term sheets, and agreement models or templates. • The Senior Manager works with Key stakeholders within the University and externally to identify process strengths and weaknesses with respect to proposed research projects. This may involve participating on internal or external committees, developing inter-institutional agreement templates, negotiating Terms as well as providing input to financial and process audits.

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POSITION REQUIREMENTS:

Education:

The incumbent will have a Master's degree in a related discipline or equivalent education and experience. The incumbent will have the ability and confidence to communicate effectively with researchers from a variety of disciplines within all six faculties. He/she should have a demonstrated ability to evaluate and edit grant proposals. It is essential that the incumbent have strong project management and administration skills, or the ability to acquire these. A background in an appropriate research related field and experience with budgets are desirable. The incumbent will have, or be able to acquire, a broad knowledge of University policies and procedures relating to research and research agreements, grants management, the academic and research environment, and sponsor guidelines.

Experience:

The incumbent will have at a minimum of 3 years direct experience reviewing and negotiating legal agreements or similar direct experience reviewing, drafting or writing research proposals. This position requires an individual with extensive knowledge of the academic and research environment, research sponsor guidelines, and university financial, legal, administrative and human resources regulations, procedures, policies, and guidelines. A minimum of 3 years working in a research office is desirable, with some prior supervisory experience.

Technical:

MS Word	Excel	PowerPoint	Other
Advanced	Advanced	Required	Adobe Pro

NATURE AND SCOPE:

Interpersonal Skills:

The incumbent will be an independent, proactive administrator with exceptional communication (oral and written), organizational and presentation skills, ensuring effective interaction broadly within the University and with external partners and research sponsors. The incumbent must have personal initiative, the ability to be flexible and strong problem-solving skills. The incumbent will have strong analytical skills, be able to interpret accurately and apply agency and institutional regulations, policies and guidelines and to integrate report data from various sources. The ability to work with confidential information, to work independently and as part of a team, and the capacity to work effectively and efficiently in a complex, fast-paced and changing environment with numerous deadlines and priorities is essential. The incumbent serves as a professional and competent resource to external partners and to members of the university community.

Level of Responsibility:

The Senior Manager, Institutional Research will take the lead on specified research programs within the portfolio. As the lead on these programs, the Senior Manager, Institutional Research provides support, coaching, and training, as applicable, to stakeholders of the particular research project and acts as a mentor by providing guidance and supervision to Grants and Contracts Managers in the unit. The incumbent interacts extensively with: the Vice-President, University Research; the Associate Vice-President, University Research; Faculty Deans; Associate Deans Research; the Secretariat; the Graduate Studies Office; the Development Office; Safety Office, Procurement Office, Department Chairs and School Directors; and other Office of Research Staff, including the Director, Institutional Research; Director, Research Finance and Director, Ethics.

Decision-Making Authority:

Per University Procedure 1A, The Senior Manager, Institutional Research has delegated authority to sign on proposals and resulting research contracts up to a value of \$500,000 CDN.

Physical and Sensory Demands:

Requires exertion of physical or sensory effort resulting in slight fatigue, strain or risk of injury.

Working Environment:

Involves minimal physical or psychological risk resulting from unavoidable exposure to hazardous, disagreeable or uncomfortable environmental conditions.