

Research Administrator Competencies and Resources

This document identifies key skills, knowledge, and abilities (or “competencies”) recommended for Research Administrators (RAs) to demonstrate success in their respective positions. It also ties those competencies to various training and resources to further develop them.

How to Use This Document

- The competencies and resources are organized by sponsored project lifecycle, with each lifecycle phase represented by a color block in the left column.
- The **Suggested Competencies** column identifies the tasks, knowledge, and skills typically needed for demonstrated success within a lifecycle phase.
- The remaining three columns map training and resources to specific competencies within a lifecycle phase. These resources are organized by Navigate Training and Resources, U-M Training and Resources, and external resources.

Tip: To search for a term, use **Command + f** (Macintosh) or **ctrl + f** (Windows), type the word in the search box, and press the enter key.



Lifecycle Phase	Suggested Competencies	Navigate Resources	Other Internal U-M Resources	External Resources
Overview	Identify Internal U-M Research Administration Resources	Navigate Training and Workshops	Research Administrators' Toolkit	
		Navigate: Research Administration at the University of Michigan video	Navigating the ORSP Web Site	
			U-M Research Annual Reports	
	Understand internal and external research administration terms, acronyms, and business processes.		Office of the Vice President for Research	Grants.gov - Grant Terminology
			Navigating the ORSP Web Site	NIH Glossary & Acronym List
Find/Understand Funding	Identify U-M tools and resources for finding funding opportunities		U-M Library Funding Databases - COS/Pivot - Grants.gov - Foundation Directory Online	
			U-M Library External Research Funding Sources (State, Federal, Industry, etc.)	
			Foundation Relations - Grantwriter's Toolkit	
			Foundation Funding for Faculty	
			U-M Michigan Engineering - Funding Opportunities	
			U-M Medical School Competition Space	
			U-M Medical School Office of Research - Find Funding	
			ORSP Find Funding ORSP Newsletter Sign Up	
	Understand, interpret, and communicate sponsor guidelines	Navigate E-ssentials course in My LINC: Proposal Preparation & Submission		Grants.gov system
		Navigate: Lunch & Learn - Sponsor Highlight: National Institutes of Health (NIH)		NIH Submission Policies
		Navigate: Lunch & Learn - Sponsor Highlight: National Science Foundation (NSF)		NSF Proposal and Award Policies and Procedures Guide
	Support the PI in the development of an effective proposal.	Navigate E-ssentials course in My LINC: Proposal Preparation & Submission	ORSP - Principal Investigator (PI)	NIH Submission Policies
			ORSP - Develop Proposal	NIH Grants Basics
			ORSP - Proposal Writer's Guide	NSF Proposal and Award Policies and Procedures Guide
			ORSP - Route and Submit Proposal	NSF Preparing Proposals
			ORSP - Facilities & Administrative Costs (F&A)	
			ORSP - Frequently Required Proposal Documents and Data	

Lifecycle Phase	Suggested Competencies	Navigate Resources	Other Internal U-M Resources	External Resources	
Develop Proposal			Proposal Development - Roles and Responsibilities		
			ORSP - Biosketch		
			ORSP - Data Sharing and Use Agreements		
			U-M Medical School - Proposal Submission Process		
			U-M Medical School - Proposal Finalization Checklist		
			U-M Medical School - Proposal Review Checklists		
			eRPM eRPM Proposal Preparation and Unit Review - Instructor Led Class		
	Create accurate project budgets and justifications.			Calendar vs Academic Year Resources	
		Navigate E-ssentials course in My LINC: Cost Share		ORSP - Research Proposals - Budget	How to Calculate Person Months
		Navigate E-ssentials course in My LINC: Understanding Effort		ORSP - Subawards vs Purchase Order	NIH NIAID Create a Budget
		Navigate: Lunch & Learn - Effort		U-M Cost Sharing Overview and Requirements	
		Navigate: Lunch & Learn - Subawards, Hybrids and POs		Addressing NSF's requirement for Definition of a "year" in Budget Justification	
		Navigate E-ssentials course in My LINC: Costs of All Kinds		Fabrication	
		Navigate E-ssentials course in My LINC: Uniform Guidance Cost Principles		University (U-Year) Appointment Information	NSF Policy Statement
		Navigate E-ssentials course in My LINC: Cost Accounting Standards		Recharge Rates	
	Navigate E-ssentials course in My LINC: Graduate Student & Postdoctoral Appointments on Sponsored Projects				
Recognize and take appropriate action based on requirements of various agreement types.			Subawards, Hybrid Agreements and Purchase Orders	Contractual Terms Resource (Nolo's Free Dictionary of Law Terms and Legal Definitions)	
			eRPM eRPM Proposal Preparation and Unit Review - Instructor Led Class	The Federal Acquisition Regulation (FAR): Answers to Frequently Asked	
			ORSP - Unfunded Agreement Types	NCURA - The Federal Acquisition Regulations and Defense Contracting: An Overview	
			ORSP - Data Use Agreements	Wikipedia - Federal Acquisition Regulation	

Lifecycle Phase	Suggested Competencies	Navigate Resources	Other Internal U-M Resources	External Resources
			ORSP - Non-Disclosure Agreements	
			U-M Medical School - Using eRPM: PAFs, CTRFs & UFAs	
			Innovation Partnerships: Material Transfer Agreements (MTA)	
Route & Submit	Complete and Route a Proposal Approval Form (PAF) in the eResearch Proposal Management System.	Navigate E-ssentials course in My LINC: Proposal Preparation & Submission	Proposal Approval Form (PAF)	
			eRPM eRPM Proposal Preparation and Unit Review - Instructor Led Class	
			Featured ITS eRPM How-To Guides	
			Create / Complete a PAF	
			Review a PAF	
			PI Sign PAF / COI	
			eRPM System Workflow without Changes	
			ORSP - Route & Submit Proposal	
			Proposal Processing Deadlines	
			U-M Roles and Responsibilities - Sponsored Projects Administration	
	U-M Research Administration Schools Committee (RASC) Resources			
Ethics & Compliance	Conduct research and research administration in an ethical and compliant manner.	Navigate E-ssentials course in My LINC: Stewardship	U-M Research Ethics & Compliance	The Lab: Avoiding Research Misconduct (interactive movie on research misconduct). You become the lead characters in an interactive movie and make decisions about integrity in research that can have long-term consequences.
			Research Integrity	
			U-M Finance - Rules and Compliance	
			Federal Research Terms and Conditions	
			U-M Ethics, Integrity, & Compliance	
			U-M Compliance Hotline	
			PEERRS Training	
			HR Statement on Stewardship	
	SPG 500.01: Fiscal Responsibility (Section V)			

Lifecycle Phase	Suggested Competencies	Navigate Resources	Other Internal U-M Resources	External Resources
			SPG 303.03: Policy Statement on the Integrity of Scholarship	
			Procedures for Investigating Allegations of Misconduct in the Pursuit of Scholarship and Research under SPG 303.03	
Set Up Project	Set up award/project in accordance with University standards and practices.	Navigate E-ssentials course in My LINC: Proposal Preparation & Submission	ORSP - Set Up Project	NIH Grants Policy Statement
		Navigate E-ssentials course in My LINC: Understanding Effort	U-M Cost Sharing Overview and Requirements	NSF Proposal and Award Policies and Procedures Guide
		Navigate E-ssentials course in My LINC: Cost Share	Subawards, Hybrid Agreements and Purchase Orders	NCURA Video: The Basic Definition of Cost Sharing
		Navigate E-ssentials course in My LINC: Effort Certification	New Award Management Functionality	
		Navigate E-ssentials course in My LINC: Cost Accounting Standards	Award Management Training - ITS Job Aids & Reference Materials	
		Navigate E-ssentials course in My LINC: Monitoring Capital Equipment: Research Administrator Best Practices	Establishing Subprojects (formerly Subaccounts)	
		Navigate: Lunch & Learn - Subawards, Hybrids and POs	Request for Sponsored Sub Project/Grant(s) Form	
		Navigate: Lunch & Learn - Effort	External Recharge Rate Resources	
			Full Recovery of Facilities and Administrative Costs	
			SPG 501.10: Policy on Effort Certification	
			U-M Finance - Effort Reporting	
			U-M Medical School - What is Effort Reporting?	
			U-M Finance - ChartFields	
			My LINC - ChartFields Resources	
			CFE101 Introduction to ChartFields - My Linc eLearning course	
			Budget Reallocation Functionality	
			U-M Finance - Equipment	
	Fabricated Equipment - Key Unit Responsibilities			
	U-M Office of Space Analysis			
	U-M Office of Property Control - Asset Management			

Lifecycle Phase	Suggested Competencies	Navigate Resources	Other Internal U-M Resources	External Resources
			Faculty/Principal Investigator Research Onboarding and Offboarding Checklists (Word document)	
			Request for Approval of Publication Restrictions	
			Openness in Research and Agreement Acceptance Requests (AAR)	
			The University of Michigan Faculty Handbook	
			Implementation of Regents' Policy Concerning Research Grants, Contracts, and Agreements	
			SPG 502.04: Sales of Goods and Services to Non-University Entities and Federal Unrelated Business Income (UBI)	
			Export Control Policies	
	Identify internal U-M offices providing support to research in schools/colleges/units.		U-M Office of Research	
			ORSP - Manage Project	
			U-M Shared Services Center	
			U-M Innovation Partnerships	
			U-M Financial Operations	
			U-M Sponsored Programs	
			Medical School Office of Research Units	
	Manage and Monitor Project		ORSP - Manage Project	NIH NIAID - Reporting Requirements During Your Grant
			ORSP - Roles and Responsibilities - Sponsored Projects Administration	2 CFR 200.327 - Financial Reporting
			Office of Contract Administration	NIH NIAID Site Visits, Grantee SOP
			ORSP A-Z Index and Glossary	NIH Early Independence Award Site Visits
			U-M Innovation Partnerships	
			SPG 303.04: University of Michigan Technology Transfer Policy	

Lifecycle Phase	Suggested Competencies	Navigate Resources	Other Internal U-M Resources	External Resources
Manage Project		<u>Navigate: Lunch & Learn - Effort</u>	<u>Federal Recipient Monitoring Guide</u>	
		<u>Navigate: Lunch & Learn - Subawards, Hybrids and POs</u>	<u>Federal Recipient Monitoring Guide - Appendix - Subrecipient Monitoring Roles and Responsibilities</u>	
		<u>BusinessObjects User Resources (including link to eLearning course in My LINC)</u>	<u>Subawards, Hybrid Agreements and Purchase Orders</u>	
		<u>IQ_BO101 - BusinessObjects Introductory Training (instructor led) - My LINC</u>	<u>Subcontract / Subrecipient - A to Z Glossary</u>	
		<u>IQ_TAB101 - Tableau Introductory Training (instructor led) - My LINC</u>	<u>Effort Reporting</u>	
			<u>SPG 501.10: Policy on Effort Certification</u>	
			<u>FY18 Employment - Effort Certification Written Procedures</u>	
			<u>Medical School - Effort Reporting Expectations</u>	
			<u>U-M Cost Sharing Overview and Requirements</u>	
			<u>OVPR Cost Sharing</u>	
			<u>Cost Sharing by Rackham</u>	
			<u>OVPR Cost Sharing Form</u>	
			<u>Full Recovery of Facilities & Administrative Costs</u>	
			<u>Transfer and Disposition of Research Equipment</u>	
			<u>Equipment for Core Facilities</u>	
			<u>Project/Grant Reports (M-Reports)</u>	
			<u>U-M ITS - Analytics & Reporting (information/resources on BusinessObjects, M-Reports, Tableau)</u>	
			<u>RPPRs at U-M</u>	
			<u>Clinical Trials Registration & Results Reporting</u>	
			<u>Featured ITS eRPM How-To Guides</u>	
	<u>U-M Office of the Provost - Research Space Guidelines</u>			
	<u>Controlled Substance Compliance: DEA Inspection Preparation</u>			

Lifecycle Phase	Suggested Competencies	Navigate Resources	Other Internal U-M Resources	External Resources	
Close Out Project	Close out award/project in accordance with University standards and practices.		Federal Research Terms and Conditions		
			RTC: Federal Wide Research Terms and Conditions		
			Operations Manual - Quality Assurance and Research Compliance		
Close Out Project	Understand internal and external records management requirements.		SPG 604.01: Departmental Record Retention for Business and Financial Records	The Uniform Guidance: Retention Requirements for Records	
			U-M Human Research Protection Program (HRPP) Operations Manual Part 11: Laws, Regulations, and Standards Par. 11.F		
Close Out Project	Effectively manage the departure of research faculty leaving the univeristy.		ACR / Award Change Requests (ACRs)		
			Faculty/Principal Investigator Research Onboarding and Offboarding Checklists (Word document)		
			U-M Research Administration Schools Committee - Transferring Grants Best Practice		
			Subawards, Hybrid Agreements and Purchase Orders		