

Market Title		Survey Specialist Associate – 103327		Survey Specialist Intermediate - 103256			Survey Specialist Senior - 103257			Survey Director - 103258	
Position Steps				Intermediate Step 1	Intermediate Step 2	Intermediate Step 3	Senior Step 1	Senior Step 2	Senior Step 3		
GENERAL DESCRIPTION			Under direct supervision, assists project and unit team members with all phases of survey project preparation and implementation, including pre-production, production management, project deliverables, and documentation. Assists with questionnaire development, including scripting survey instruments, testing survey instruments, and summarizing testing protocols and results. Conducts pretest and pilot interviews. May supervise temporary staff completing data collection tasks, ensuring that protocols are consistently applied. Under FLSA, incumbents in this position are nonexempt.	Plan and oversee data collection projects in two or more aspects of survey research (i.e., sampling, data collection, coding, data processing, application programming, analysis, methodology) in compliance with established procedures and/or protocols. Coordinates with primary research staff and other operations personnel in the management of projects generally with budgets totaling \$100,000 to \$1,000,000, relying on others with specific areas of expertise. Identifies staffing resource needs. Employees in this classification typically analyze, compare and evaluate various courses of action and have the authority to make independent decisions on matters of significance, free from immediate direction, within the scope of their responsibilities. Primary activities and decision making authority are predominantly performed independently affecting business operations to a substantial degree. Under FLSA, incumbents in this position meet the criteria for exempt status.			Plan and execute data collection projects in three or more aspects of survey research using complex designs (i.e., sampling, data collection, coding, data processing, application programming, analysis, methodology) that requires interpreting/solving more complex, less clearly-defined issues. Coordinates with primary research staff and other operations personnel in the management of projects generally with budgets totaling \$1,000,000 to \$5,000,000, with increasing authority, accountability and decision-making regarding budget, purchases, and hiring of staff. Is an effective team leader, relying on guidance only in aspects or areas outside primary technical specialty. Employees in this classification typically analyze, compare and evaluate various courses of action and have the authority to make independent decisions on matters of significance, free from immediate direction, within the scope of their responsibilities. Primary activities and decision making authority are predominantly performed independently affecting business operations to a substantial degree. Under FLSA, incumbents in this position meet the criteria for exempt status.			Direct data collection projects in all areas of survey research using complex designs (i.e., sampling, data collection, coding, data processing, application programming, analysis, methodology) receiving only administrative supervision. Coordinates with primary research staff and other operations personnel in the management of projects generally with budgets totaling \$5,000,000 - \$10,000,000 or smaller projects with highly complex or high risk designs with full authority, accountability and decision-making regarding budget, purchases, and hiring of staff. Effective in team building, coaching and persuasion skills and demonstrates expert level competence in multiple disciplines through technical innovations and/or solutions to complex situations. The primary duty of employees in this classification is the management of a customarily recognized department or subdivision, including the supervision of three or more full-time equivalent employees every week. Direction is over a permanent status-continuing function, not a collection of employees assigned to complete a project. Management duties include interviewing, selecting and training of employees; setting and adjusting their rates of pay and hours of work; planning and directing their work; appraising their productivity and efficiency for the purpose of recommending promotions or other changes in their status; handling their complaints and grievances and disciplining them when necessary. Management responsibilities include the authority to hire, fire, or promote assigned employees or make recommendations that are given particular weight. Employees have impact on budgeting, controlling costs, planning, scheduling, and procedural change. Under FLSA, incumbents in this position meet the criteria for exempt status.	
		SPECIFIC DESCRIPTION	Assists managers in all phases of survey projects and/or operations. Provides functional supervision for temp/contingent staff; coordinates sub-projects and/or small operations units (e.g. work shifts).	Coordinates many phases of survey projects/sub-projects or operations generally with budgets totaling up \$100,000-\$250,000 across the year (or lower budgets with more complexity).	Coordinates all phases of survey projects/sub-projects or operations generally with budgets totaling up to \$250,000-\$500,000 across the year (or lower budgets with more complexity).	Coordinates all phases of survey projects/sub-projects or operations generally with budgets totaling up to \$500,000-\$1,000,000 across the year (or lower budgets with more complexity).	Manages, while coordinating with clients, well defined medium-to-large size survey projects/sub-projects or operations in one or more modes of data collection with budgets totaling up to \$1,000,000-\$2,000,000 across the year (or lower budgets with more complexity).	Manages, while coordinating with clients, moderately-complex medium-to-large size survey projects/ sub-projects or operations for interviewer administered and some other modes of data collection with budgets up to about \$1,000,000-\$3,000,000 across the year (or lower budgets with more complexity).	Manages, while coordinating with clients, moderately-complex large sized projects/ subprojects or operations for interviewer administered and mixed modes of data collection with budgets up to about \$1,000,000-\$5,000,000 across the year (or lower budgets with more complexity).	Directs with full authority, while coordinating with cross-unit primary research staffs, all aspects of highly-complex and risky survey research projects or operations with budgets of \$2,000,000 - \$10,000,000 (generally in the \$5,000,000 to \$10,000,000 range) using multiple modes of data collection (or lower budgets with more complexity). May direct department functions that include oversight of multiple million dollar projects or operations totaling more than \$10,000,000	
		EXPERIENCE	One or more years of progressively responsible experience in survey research or related field.	Three or more years of progressively responsible experience in survey research or related field.	Four or more years of progressively responsible experience in survey research or related field.	Continuing education in the field with four or more years of progressively responsible experience in survey research or related field.	Five or more years of progressively responsible experience in survey research or related field.	Six or more years of progressively responsible experience in survey research or related field.	Continuing education in the field with six or more years of progressively responsible experience in survey research or related field.	Seven or more years of progressively responsible experience in survey research methods or related field.	

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DEVELOPMENT OF SELF/OTHERS		Takes initiatives to obtain input and feedback from immediate supervisor while learning new skills and identifying potential learning opportunities.	Receives and incorporates input from immediate, supervisor, functional supervisors and co-workers while learning to apply professional knowledge, skills and training.	Applies knowledge and skills to work competently and independently while seeking advice and feedback from others.	Works competently and interdependently with team members - both providing direction to others and seeking input from others.	Makes independent decisions on matters of significance, free from immediate direction, within the scope of their responsibilities; Assumes responsibility for mentoring other survey specialists. Brings information back to co-workers from professional forums.	Makes independent decisions on matters of significance, free from immediate direction, within the scope of their responsibilities; Mentors other project leaders regarding effective management of work team members. Presents information at professional forums.	Makes independent decisions on matters of significance, free from immediate direction, within the scope of their responsibilities; Develops professional growth plans as part of functional supervision for work team members. Defines new topics and presents at professional forums.	Independently performs project assignments and meets all areas of responsibility; Contributes to and participates in organization’s quality assurance project/operations review program; Receives limited administrative supervision; Serves as mentor and administrative supervisor to staff.
		Effectively communicates with direct supervisor as well as co-workers using technical terms knowledgeably, including demonstrates ability to receive and direct communications to all work group members.	Demonstrates effective basic interpersonal skills when participating in work groups including: uses active listening well; provides routine factual information in a pleasant and professional manner; cooperates with and supports work group members.	Demonstrates developed interpersonal skills when participating in work groups and client meetings including: pursues appropriate mode of communication; modifies communication based on awareness of others; effectively shares material and information in groups.	Demonstrates developed interpersonal skills when participating in work groups and client meetings including: pursues appropriate mode of communication; modifies communication based on awareness of others; effectively shares material and information in groups.	Uses advanced communication skills to accomplish goals, influence others and lead groups including: creates materials and delivers clear presentations tailored to the type and level of audience; clearly and concisely communicates and responds to complex information; effectively engages in discussions with clients.	Uses advanced communication and emerging negotiation skills in complex settings to accomplish work group goals and influence clients including; employs a variety of tools and visual aids to communicate complex material; effectively communicates with others with differing opinions; successfully initiates, conducts, and summarizes discussions with clients.	Uses advanced communication and developed negotiation skills in all settings including those with conflict to accomplish work group goals and influence others with different opinions including: uses effective strategies, arguments, and materials; mediates disputes among team members; successfully manages all aspects of client communication.	Uses effective communication skills requiring knowledge of the organization and knowledge of technical and regulatory aspects of the work. Effectively negotiates, including dealing with complaints and maintaining composure under extreme stress while handling complex and sensitive problems.
ACCOUNTABILITY/ LEADERSHIP		Requires direct supervision for schedule, assignments, productivity compliance and quality compliance. Seeks input from supervisor to understand the organization’s mission, norms and assets while showing accountability for schedule, assignments, productivity compliance and quality compliance. May take responsibility for small work group schedules, assignments, productivity compliance and quality compliance.	Receives oversight from senior managers while establishing ability to reliably meet high performance standards aligned with organizational policies and culture.	Seeks verification from senior managers that high performance standards are met aligned with organizational policies and culture including contributions toward positively influencing other work group members.	Demonstrates independence meeting high performance standards and leading work groups while continuing to receive guidance in aspects outside primary technical specialty or new areas.	Independently leads work groups comprised of team members that have well established skills and roles while continuing to receive guidance in handling difficult team members and/or poorly specified roles and responsibilities.	Independently leads work groups comprised of diverse team members with varying competencies and skills while assuming increased authority to define team member roles and responsibilities.	Demonstrates full competence leading diverse work groups, provides oversight and mentoring to less experienced leaders and establishes interdependent relationships with others to enhance effective use of work group resources.	Leads all projects and operations as a technical expert identifying and resolving complex problems using applicable principles/ theories and contributes to task team leaders’ and team members’ performance evaluations while exercising authority, accountability and decision making regarding budgets. With experience, serves as a peer to senior staff to address a wide range of problems or needs within the organization.

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MANAGEMENT		<p>Receives guidance from direct supervisor regarding time management and task priorities.</p> <p>Develops ability to independently compose and manage work plans for own assigned activities. Receives some guidance from managers while learning to develop plans for activities assigned to other work group members and may supervise shifts of contingent staff members.</p>	<p>Independently composes and manages work plans for selected activities assigned to small work groups and receives some guidance from senior managers while learning to manage all project phases/modes and may participate in hiring then may train and supervise small teams of contingent staff members.</p>	<p>Manages a work group that is implementing a small project or operations activity while receiving some guidance from senior managers during planning, implementing, monitoring, and product delivery phases and may be responsible for administrative supervision of medium-size teams of contingent staff members. Develops specific action steps, achieves deadlines or milestones.</p>	<p>Manages the budgets and leads work groups implementing projects or operation activities while seeking verification of good performance from senior managers during planning, implementing, monitoring, and product delivery phases and may be responsible for administrative supervision of large-size teams of contingent staff members.</p>	<p>Leads all aspects of well-established medium to large size projects and/or operations and manages required work scope and budget changes while seeking guidance from senior managers in areas of risk and coordinating with principal investigators and may be responsible for administrative supervision of contingent staff members including handling difficult personnel issues.</p>	<p>Leads all aspects of well-established medium to large size projects and/or operations in various modes and concurrently manages multiple areas of responsibility while seeking verification from senior managers of good decision-making in areas of risk and coordinating with principal investigators and may make complex contingent personnel management decisions.</p>	<p>Leads all aspects of medium to large size projects and/or operations and concurrently manages complex plans and changing scope while using data and experts to form resolutions regarding areas of risk and coordinating with principal investigators and may contribute to organizational decisions regarding contingent staffing options and personnel management decisions.</p>	<p>Directs projects and/or operations with multi-management components including coordinates with primary researchers on project designs and collaborates on methodological studies then successfully directs task team leaders from multiple functional areas as they implement complex projects; provides administrative supervision to professional staff.</p> <p>May direct units within the department while concurrently directing projects/operations. When directing units, oversees the unit's administrative supervision program for professional staff.</p>
	<p><i>Research Administration / Technical Tools / Survey Methodology / Statistical Analysis / Apply Subject Area Knowledge</i></p>	<p>Follows best practices in own work and in work delegated to contingent/temp staff to comply with standards and regulations in the following areas: applying principles from UM PEERs – Human Research module; using procedures and materials from the department's best practice references; using department sample management system tools; applying principles from General Interviewing Techniques to conduct data collection support activities; creating and using basic statistical reports to make decisions about assignments.</p>	<p>Specifies assignments for self and small work groups to comply with standards and regulations in the following areas: processing basic UM eResearch steps; using department system tools to develop and test instruments; composing instruction guides that follow the department's best practice references; creating and using basic statistical reports to show project progress.</p>	<p>Coordinates assignments for work teams to comply with standards and regulations in the following areas: inputting support documents in UM eResearch; developing technical specifications for department system tools; composing project management plans using well established survey methods; using basic statistics to specify aspects of project plans.</p>	<p>Coordinates work team efforts to comply with standards and regulations in the following areas: composing sections of IRBs and process financial accounting forms; defining system testing programs; composing management plans that use well established survey methods in several modes plus quality assurance programs; using basic statistics to monitor trends on projects; applies AAPOR standards.</p>	<p>Manages project and operations teams to comply with standards and regulations in the following areas: writing federal certificates of confidentiality, & human protection materials such as consent forms; processing budget account changes; developing full technical specifications for standard projects; evaluating cost and error trade-offs; creating statistical experimental designs; providing consultation on questionnaire development.</p>	<p>Manages project and operations teams to comply with standards and regulations in the following areas: recommending IRB type/risks; develop - ing small proposal budgets & work scope materials; developing full technical specifications for moderately-complex projects; designing procedures across multiple modes; exploring data (project /production) & choosing appropriate statistics.</p>	<p>Manages project and operations teams to comply with standards and regulations in the following areas: leading technical proposal development teams; specifying quality assurance for data processing and analysis activities; specifying data structure & output; recommending best ways to use survey para data; developing survey and sample plans; testing simple hypotheses.</p>	<p>May provide leadership in use and understanding of, or instruction and mentorship to project leads in the use of, major subject areas employed to implement work activities and projects in areas of research administration, technical tools, survey methods, statistic analysis, and subject area knowledge.</p> <p>May guide development and use of new knowledge by contributing to administrative-level decisions about organizational assets and applications.</p>

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JOB DESCRIPTION AND RESPONSIBILITIES	<p>Assist project manager with all phases of survey project preparation and implementation, including pre-production, production management, project deliverables, and documentation; assist with preparing project work plans and schedules in consultation with project manager, study staffs, and project team members.</p> <p>Assist in questionnaire development, including scripting survey instruments, testing survey instruments, and summarizing testing protocols and results; conduct pretest and pilot interviews; assist in preparation of specifications for development of technical systems.</p> <p>Assist in the implementation of data collection services, including mailings, ordering of supplies, and specialized tracking. Assist in the development of training materials; assist with training sessions.</p> <p>Supervise contingent staff completing surveys and other instruments; ensure protocols are being consistently followed by staff through review and monitoring of work products; implement quality control procedures; participate in problem identification and resolution during data collection and processing period.</p> <p>Receive and log materials from decentralized staff; prepare survey questionnaires and other instruments for processing, including editing and interpretive coding.</p>	<p>Interpret implementation specifications as clients develop survey research project designs; lead the project team on well-established projects to meet deliverables on time and on budget; lead tasks on larger projects; manage project/task scope and maintain a clearly defined scope statement; prepare project work plans and schedules in consultation with study staffs and other members of the project team. Manage project operations. Compose, manage, and update the project work plan, including: project goals, objectives and scope, budget, assumptions, constraints, roles and responsibilities, risks, change management approach, project deliverables, and milestones. Responsible for meeting data collection and processing requirements according to schedule and budget; use statistical process control techniques to monitor all aspects of production; track and report project status to senior management on a regular basis. Participate in questionnaire and other instrument development and specification and development of technical systems.</p> <p>Supervise staff completing surveys and other instruments; ensure protocols are being consistently followed by staff through review and monitoring of work products; participate in problem identification and resolution during data collection and processing period. Assist in proposal preparation, and lead small proposal efforts; oversee proposal/project budgeting process with direction from senior staff. Document all phases of the data collection process; assist in preparation of basic analyses of data; forecast project expenses. Develop and implement contingent staff recruitment strategies; recruit, screen, hire, and train data collection staff; develop training plans and materials; implement general and study-specific training programs.</p>	<p>Consult with clients on the development of survey research project designs; lead the project team on medium and large projects to meet deliverables on time and on budget; lead tasks on larger projects; define and manage project/task scope and maintain a clear scope statement; prepare project work plans and schedules in consultation with study staffs and other members of the project team. Represent research project to stakeholders, as required, such as community leaders, funders, researchers, and respondents. Manage and continually improve project operations. Compose, manage, and update the project work plan, including project goals, objectives and scope, budget, assumptions, constraints, roles and responsibilities, risks, change management approach, project deliverables, and milestones. Responsible for meeting data collection and processing requirements according to schedule and budget; use statistical process control techniques to monitor all aspects of production; track and report project status to senior management on a regular basis. Lead questionnaire and other instrument development as well as specification and development of technical systems. Supervise staff completing surveys and other data collections; ensure protocols are being consistently followed by staff through review and monitoring of work products; participate in problem identification and resolution during data collection and processing period; recommend organizational improvements in staff and quality assurance protocols. Assist in proposal preparation with responsibility for researching and writing sections, and lead medium-sized/complexity proposal efforts; independently oversee proposal/project budgeting process. Document all phases of the data collection and processing protocols; prepare complex analyses of data and reports; forecast project expenses. Develop and implement contingent staff recruitment strategies; recruit, screen, hire, and train data collection staff; develop training plans and materials; implement general and study-specific training programs.</p>	<p>Consult with clients on the development of large or complex survey designs; provide senior leadership to the project team on large projects to meet deliverables on time and on budget; define project/task scope and maintain a clear scope statement; prepare project work plans and schedules in consultation with study staffs and other members of the project team. Represent research projects to stakeholders, as required, such as community leaders, funders, researchers, and respondents; represent organization at national and international conferences and in journals. Define, manage, and continually improve project operations. Develop and maintain the project work plan, including project goals, objectives and scope, budget, assumptions, constraints, roles and responsibilities, risks, change management approach, project deliverables, and milestones. Responsible for working interdependently to meet data collection and processing requirements according to schedule and budget; use statistical process control techniques to monitor all aspects of production; track and report project status and risks to senior management. Prepare questionnaires and instruments for data collection, including identification of relevant measures to be used; lead development of complex technical systems. Document all phases of the data collection process; prepare complex analyses of data and reports; forecast project expenses; provide accurate financial data and reports. Mentor staff and participate in recruitment of new staff; serve as organizational liaison to junior staff; author staff performance evaluations. Identify opportunities to submit proposals or other collaborations. Recommend organizational improvements in staff and quality assurance protocols. Lead proposal development team or review sections of proposals of all sizes; independently oversee proposal/project budgeting process. Develop training plans and materials; design and conduct general and study-specific trainings, briefings, and debriefings.</p>
DEPARTMENT QUALIFICATIONS	<p>Bachelor’s degree in social sciences or related field with experience in survey research (and/or equivalent combination of education and experience). One or more years of progressively responsible experience in survey research or related area. Demonstrated competence in MS Office software. Excellent communication and organizational skills; ability to compose basic instructions, memos and revise documents and manuals using word processing software.</p> <p>Desired: Advanced skills with document formatting. Master’s degree in related field. Demonstrated knowledge using critical thinking skills in problem solving; experience with computer-assisted interviewing (CAI) system; experience with testing of technical systems; experience in manipulation of small data sets for simple file creation and presentation in tables; experience using statistical techniques and/or software (e.g., SAS, SPSS, Excel, etc.).</p>	<p>Bachelor’s degree in social sciences with three or more years of progressively responsible experience in survey research or related field (and/or equivalent combination of education and experience). Three or more years experience in two or more aspects of survey research. Experience managing survey projects and/or operations in multiple modes of data collection with budgets totaling up \$100,000-\$1,000,000 the year or lower budgets with more complexity. Experience with computer assisted interviewing (CAI) software and experience using and developing technical systems designed to collect and organize data. Demonstrated leadership and supervisory experience with multiple groups and individuals from diverse cultures. Ability to work collaboratively with staff at all levels and under tight deadlines. Demonstrated ability to compose instructions, memoranda and other technical writing. Excellent communication and organizational skills and demonstrated competence in MS Office software.</p> <p>Desired: Master’s degree in related field. Experience using statistical techniques for problem solving and forecasting.</p>	<p>Master’s degree in related field and/or equivalent combination of education and experience, plus continuing education in the field. 5-6 years experience in three or more aspects of survey research; experience planning and managing projects in multiple modes of data collection; experience creating and managing a budget and resources for survey projects of approximately \$1,000,000-\$5,000,000 across the year or lower budgets with more complexity. Experience using and developing technical systems designed to collect and organize data such as computer-assisted interviewing (CAI) software and/or management information technical systems. Demonstrated ability to manage team’s ability to meet deadlines under tight time constraints. Ability to work independently and demonstrated experience making independent decisions while using correct judgment about when to seek guidance from senior staff. Effective and demonstrated leadership and supervisory skills with multiple groups and individuals from diverse backgrounds. Ability to work collaboratively with staff at all levels. Ability to use critical reasoning in preparing survey plans, assessing issues, evaluating risks. Demonstrated ability to compose instructions, memoranda, manuals and other documents, including technical material. Experience using statistical techniques for problem solving and forecasting. Excellent communication and organizational skills and demonstrated competence in MS Office software.</p>	<p>Master’s degree in a social science discipline and/or equivalent combination of education and experience, plus continuing education in the field with seven or more years of progressively responsible experience in survey research or related field/ Master's degree in survey research methods desired. Seven or more years experience in all aspects of survey research with relevant knowledge in at least one substantive or methodological area. Experience successfully planning and managing all aspects of survey projects and/or operations with budgets totaling up to about \$2,000,000-\$10,000,000 across the year or lower budgets with more complexity in multiple modes of data collection. Experience planning and developing technical systems designed to collect and organize data such as computer-assisted interviewing (CAI) software and/or management information technical systems. Demonstrated ability to manage team’s ability to meet deadlines under tight time constraints. Experience making independent decisions on matters of significance, free from immediate direction, within the scope of defined responsibilities. Effective and demonstrated leadership and supervisory skills with multiple groups and individuals from diverse backgrounds. Ability to serve as administrative supervisor for staff at all levels. Ability to use critical reasoning and to manage team members’ use of critical reasoning in preparing survey plans, assess issues, evaluate risks. Ability to compose advanced manuals and project documentation as well as author executive reports and journal articles. Experience using statistical techniques for problem solving and forecasting and experience using statistical software to conduct analyses. Excellent communication, and organizational skills and demonstrated competence in MS Office software.</p>