EHRA Non-Faculty Instructional, Research and Information Technology Positions
General Guidelines for Minimum Education and Experience

INTRODUCTION

EHRA non-faculty positions qualifying for designation as “Instructional, Research, and Information Technology” (IRIT) are categorized by the following:

- These positions support the core-mission of the University by creating and disseminating knowledge through direct instruction, research, and public service; or performing professional-level duties that are integral to and uniquely supportive of that work. The purpose of each such position must be substantially engaged in the regular academic, educational, research, or public-service/extension activities of the University.

- These positions require the exercise of professional expertise and discretion in determining the nature and content of the instructional-, educational-, research-, or public-service-related activities, and in evaluating the effectiveness of such activities, and/or involve significant and independent interaction with participants in the University’s instructional, educational, research, or public-service programs.

The ongoing job responsibilities for such positions must:

- Engage in or be uniquely supportive of instruction, student success, and/or the direction or coordination of education or academic-supportive activities; AND/OR

- Engage in or be uniquely supportive of original scholarship, creativity, or scientific research efforts, and the dissemination of such research/scholarship results (including dissemination through extension/public service). The ongoing job responsibilities must be involved with independent research design, implementation of research procedures, analysis of data, interpretation of research results, and/or dissemination of results through publication or public service; AND/OR

- Serve as a staff physician or staff veterinarian (without faculty rank), providing clinical healthcare services to human or animal populations

MINIMUM EDUCATION AND EXPERIENCE

EHRA non-faculty IRIT positions generally require post-baccalaureate credentials (e.g., Master’s degree or higher), although a bachelor’s degree plus alternative or equivalent professional training and experience may be substituted for the advanced degree. It is recognized that in some areas such as information technology, admissions, financial aid, and athletics coaching and athletics management, appropriate qualified candidates may hold baccalaureate rather than advanced degrees. Positions for which post-baccalaureate credentials are not required, or for which specific degrees or certification are required, have education and experience requirements listed.

Listed below are the various individual sub-categories of Research, Instructional and Information Technology positions and their respective specific criteria. The individual EHRA IRIT subcategories
may include example statements of minimum education and experience for positions which would not require a Master’s degree or higher, or where specific degrees/certification/licensure is required.

Below are recommended education and experience guidelines as typically used in standard practice. You will recognize the education and experience may vary with a minimum of 2 years or more. When you are developing/updating a job description, you should determine the educational requirements specific to the position and the minimum number of years’ experience required. (Not a range – except where noted as required by SO.)

Please keep in mind the education and experience requirements of senior positions, related positions, or a group of positions with the same responsibilities when altering minimum requirements. Like positions should have similar minimum requirements unless there is justifiable rationale to have something different – which should be explained in the comments section.

As an industry standard, all graduate assistantships should be considered part time, 20 hour per week positions unless indicated otherwise by the candidate. This work experience would be determined using a full time equivalent (20 hours per week would be considered as 50% of the total years of experience).

**ACADEMIC ADVISING & ASSESSMENT**

Positions whose primary purpose is to advise students on academic matters such as selection of a major area of study, course selection, and academic performance. Such positions may include individuals who provide student testing and assessment as part of the academic advising process.

*Minimum Education and Experience*: Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities related to the delivery of student advising and counseling or student personnel services, will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**ACADEMIC PREPARATION & ENHANCEMENT**

Positions whose primary purpose is to improve student academic preparation through such means as tutoring and supplemental instruction, or to direct programs designed that enhance the educational experience of enrolled university students or targeted secondary school students to help prepare them for post-secondary education. This includes positions focused on enhancing the academic preparation of “at risk” student populations.

*Minimum Education and Experience*: Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities related to tutoring, supplemental instruction, or direction of programs that enhance educational experiences of enrolled or prospective students, will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**ACADEMIC STANDARDS**

Positions whose primary purpose is to develop and/or administer academic standards, curricula, and degree requirements for degree-granting programs.
**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities related to the development or administration of academic standards or curricula, will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**ACADEMIC / RESEARCH IT MANAGEMENT**

Positions whose primary purpose is to direct staff in providing information technology services that directly support the institution’s academic or research missions; these are typically individuals at the Director-level within a school-wide, college-wide, or campus-wide role, as well as positions in large, specialized research or clinical centers.

**Note:** This category is not intended for individuals who direct staff members who provide generalized or administrative information technology support that is not directly tied to an academic or research activity of the campus.

**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable background in academic or research computing management; will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**ATHLETICS COACHING AND ATHLETICS MANAGEMENT**

Positions whose primary purpose is to coach student athletes for teams sponsored by the institution, to serve as trainers to student athletes, as well as senior-level professionals with institutional responsibility for in student-athlete programs in areas of compliance, and major sports operations.

**Note:** would not include equipment & facilities managers, or positions ancillary to an athletics program.

**Minimum Education and Experience:** Minimum of a bachelor’s degree required with experience in relevant independent instructional or educational activities; specific minimum experience is at the discretion of the Director of Athletics. (Required by SO)

**CLINICAL ACADEMIC DEPARTMENT ADMINISTRATOR (CADA)**

The following criteria will be utilized by SO HRAB in evaluating proposed requests for CADA positions from UNC System campuses. All positions require individual HRAB review and approval regardless of campus delegated authority for EHRA classifications. CADA positions are intended for administrators of high-complexity, academic health centers or research-focused academic departments and centers within the University system that are engaged in a substantial amount of externally funded research and feature complex, cross-disciplinary research collaborations and partnerships.

Departments supervised by CADA positions would include:
- Human resources management
- Finance and budget
- Sponsored research administration and compliance

**Minimum Education and Experience:** Minimum qualifications of an advanced degree (masters or higher) and no less than 5 to 7 years of management-level experience in the full range of
administrative and financial functions of an academic departments or research center in a higher education, research, or health care setting. Candidates with 7 to 10 years of directly comparable experience may substitute for the required advanced degree in which case a bachelor’s degree and the requisite experience is mandatory. (Required by SO)

**CONTINUING EDUCATION**

Positions whose primary purpose is to design and deliver courses, seminars, etc., that extend the institution's regular academic and research activities to non-degree-seeking participants through targeted programs and short courses. This classification is used for instructors of non-credit courses only.

*Minimum Education and Experience:* Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities relevant to the teaching assignment, will accept an undergraduate degree and 2 or more years of relevant experience in substitution. In addition, the position minimums should satisfy any accreditation requirements in the specified area of instruction.

**COOPERATIVE EDUCATION**

Positions whose primary purpose is to develop cooperative or internship education experiences for students with employers, monitoring student progress and learning, and evaluating student performance. Such positions either have direct impact on grade assignment or are featured as an integral component of institution’s student career services activities.

*Minimum Education and Experience:* Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities related to mentoring or advising students or otherwise developing or delivering student experiential learning such as Co-Op education programs, will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**COUNSELORS**

Positions requiring credentialed professionals whose primary purpose is to provide clinical and developmental counseling or psychological services to students to enhance their psychological growth, emotional well-being, and learning potential.

*Minimum Education and Experience:* Relevant professional degree and licensure in the appropriate clinical field of psychology, social work, or mental health practice. (Required by SO)

**INSTITUTIONAL RESEARCH & ASSESSMENT MANAGEMENT**

Positions whose primary purpose is to direct and manage institution-wide data, metrics and management information about the institution’s students, faculty and staff, enrollment and academic programs, facilities, and related items as required for federal, state, and UNC system reporting. Directly supports the institution’s planning and assessment processes. This category may be used for Campus-wide roles or those who direct institutional research and assessment within a large School or College.
Note: This is not intended for analysts or other institutional research roles that do not have Director-level responsibility.

**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable independent research productivity or professional-level institutional planning/assessment experience, will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**INSTRUCTION**
Positions whose primary purpose is to determine course content, teach and evaluate enrolled students in courses for academic credit that are not assigned primary EHRA faculty status and rank.

**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities related to teaching, will accept an undergraduate degree and 2 or more years of relevant experience in substitution. In addition, the position minimums should satisfy any accreditation requirements in the specified area of instruction.

**INSTRUCTIONAL CONSULTING AND TECHNOLOGY**
Positions whose primary purpose is to assist, advise, and critique faculty and other instructional staff on instructional matters such as course content, curriculum structure, and instructional technique, or whose primary purpose is to plan, design, or implement information technology and/or multimedia approaches that directly support instructional delivery. This includes positions involved in transitioning coursework from traditional “face-to-face” delivery to on-line “distance learning” formats. This category is not to be used for individuals who provide routine information technology support within the instructional enterprise.

**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities related to consulting or developing course content, curriculum, instructional technique/technology, distance education design, development or implementation, will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**LABORATORY MANAGEMENT**
Positions whose primary purpose is to manage research and experiential laboratories and participate in design and selection of experiments, protocols, and procedures that best support the instructional or research goals and in evaluating progress towards goals.

**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable independent instructional or educational activities related to laboratory management or practice, will accept an undergraduate degree and 2 or more years of relevant experience in substitution.

**PROFESSIONAL LIBRARIANS**
Positions whose primary purpose is to support the institution’s instructional and research activities by advising students and faculty on the selection and effective use of library resource materials and
by working with faculty on instructional and research matters such as collection development. Used for professional librarians without faculty rank.

**Minimum Education and Experience:** Requires the Masters in Library Science (MLS) degree. In specialized libraries, may substitute an advanced degree in the field of specialization (e.g., legal degree for a law library, or a history degree for a special historical collection within the library setting). (Required by SO)

**PUBLIC SERVICE & EXTENSION**
Positions whose primary purpose is to provide the direct delivery of scholarship and research to public audiences and clients and/or to direct staff or programs in the development and administration of such programs, which focus or extend the academic resources and/or research products of the institution addressing community and regional issues and incorporate community needs in the institution’s academic and research programs, including agricultural extension and industrial extension.

**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable independent academic, instructional, or research activities, will accept an undergraduate degree and 2 or more years of relevant experience in substitution. This experience may be related to the direction/oversight of programs that focus on the academic and research resources towards community or regional issues.

**RESEARCH & ACADEMIC DEPARTMENT ADMINISTRATOR (RADA)**
The following criteria will be utilized by GA HRAB in evaluating proposed requests for RADA positions from UNC System campuses. All positions require individual HRAB review and approval regardless of campus delegated authority for EHRA classifications. Any approved position must meet each of the below criteria and would be classified as Instructional, Research and Public Service with a subcategory of Research Administration and Compliance. RADA positions are intended for high-complexity, research-focused academic departments and centers within the University system that are engaged in a substantial amount of externally funded research and feature complex, cross-disciplinary research collaborations and partnerships. These units are unique to the academic enterprise and attract a large volume of external funding that ultimately contributes to the economy of the local campus community and to the State. Approval of RADA positions should be reserved for the upper echelon of departments and research centers on a given campus in terms of the administrative complexity of the unit. Factors taken into account should include total size of budget from all sources, number of faculty or principal investigators served, extent of research collaborations or partnerships supported pan-campus or with external entities, and the total dollar amount of sponsored research activity managed. Typically units with approved RADA positions will feature not less than 1/2 of their total operating budgets, often greater, originating from sponsored research sources.

**Mandatory Criteria**
- The position is required to report directly to the Department Chair or Center Director; dotted line reporting relationships are not acceptable. Position incumbents must be fully
participating members of a Department or Center’s senior leadership team and in this capacity contribute to strategic planning and strategy setting for the unit.

- The position must be Director-level and have supervisory responsibilities over subordinate professional and administrative staff. Working titles such as Assistant or Associate Chair in an academic department or Assistant, Associate, or Deputy Director of a research program or center are acceptable.
- RADA positions must have full oversight and direct supervisory responsibility for the following departmental or research center functions:
  - Human resources management
  - Finance and budget
  - Sponsored research administration and compliance
  - Facilities and space management
  - Administrative strategic planning and strategy
  - Information technology (IT); unless IT reports separately to the Department Chair or Center Director which is sometimes the case given the inclusion of academic and research computing activities in these roles.

Minimum Education and Experience: Minimum qualifications of an advanced degree (masters or higher) and no less than 5 to 7 years of management-level experience in the full range of administrative and financial functions of an academic department or research center in a higher education, research, or health care setting. Candidates with 7 to 10 years of directly comparable experience may substitute for the required advanced degree in which case a bachelor’s degree and the requisite experience is mandatory. (Required by SO)

RESEARCH ADMINISTRATION & COMPLIANCE
Positions whose primary purpose is to direct and administer the programs and staff of major externally-funded research projects; serve as the chief administrative manager and compliance officer for a large academic department or research center with substantial administrative and financial complexity and which derives a significant portion of its operating budget from sponsored research funding sources; or positions that provide executive leadership of sponsored research activities either campus-wide or within a School/College dean’s office. The latter includes individuals who manage project proposals in compliance with the institution's academic and research policy, provide substantive professional advice on the development of project proposals, and negotiate with sponsoring agencies with regard to the terms and conditions that govern the conduct of sponsor research.

Note: These positions do not include first-level contract and grants developers, grant writers, or administrative support.

Minimum Education and Experience: Post-Baccalaureate degree required; for candidates demonstrating comparable independent research productivity or professional-level background in sponsored research administration, will accept an undergraduate degree and 3 or more years of relevant experience in substitution.
RESEARCH AND CLINICAL PROFESSIONALS
Positions whose primary purpose is to serve as non-faculty principal investigators, research project managers, research scholars, research scientists, or research assistants/associates for primary or secondary research projects that may advance or enhance a field of academic learning; as well as licensed clinicians who deliver research demonstration outcomes or who provide direct clinical services to clients in an academic healthcare environment. These positions function with substantial independence and expertise in original scholarship, research design, research engineering, implementation of research procedures, data analysis and interpretation of results. Research computing professionals whose principal duties involve the exercise of substantial research independence and creativity in discovering new or emerging technologies may also be considered for this category as distinguished from individuals who are operating or supporting existing, well established information technologies.

Note: These positions do not include operational or support related positions.

Minimum Education and Experience: Relevant post-Baccalaureate degree required; for candidates demonstrating comparable independent research productivity, will accept a relevant undergraduate degree and 3 or more years of relevant experience in substitution. May require terminal degree and licensure. (Required by SO)

STUDENT SUPPORT SERVICES
Positions whose primary purpose is to develop, direct and administer services for students and/or faculty that have a direct impact on the students’ educational experiences and/or campus life (e.g., student career services; student life / student housing; student honors programs; student diversity support programs; student conduct; student registration and records). This category also includes student admissions and financial aid positions that exercise decision making authority on behalf of the institution (e.g., admissions officers, financial aid officers) and professional staff who design and deliver programs and instruction that involve direct interaction with students and enhance their academic and learning experiences outside the classroom setting.

Note: These positions do not include operational or facility maintenance functions.

Minimum Education and Experience: Post-Baccalaureate degree required; for candidates demonstrating comparable independent educational or instructional activities associated with the delivery and/or management of student support functions, will accept an undergraduate degree and 2 years relevant experience in substitution.

TECHNOLOGY TRANSFER
Positions whose primary purpose is to manage the flow of research and technology innovation, disclosures, patents, trademarks, copyrights and other aspects of technology transfer. These positions include professional staff members who assess disclosures for technical and commercialization merits; develop relationships with industry or government clients; negotiate business transactions for the exchange of intellectual property rights; collaborate with regional and state economic development agencies; and/or engage in other aspects of technology transfer such as negotiating licensing or equity agreements. These positions also provide outreach services such as training and education to university faculty and students in related activities.
**Minimum Education and Experience:** Post-Baccalaureate degree required; for candidates demonstrating comparable independent research productivity or professional-level background in technology transfer, will accept an undergraduate degree and 2 or more years of relevant experience in substitution. Technology transfer experience would be related to managing the flow of research innovation, disclosures, patents, trademarks, copyrights and other aspects of technology commercialization.

**PHYSICIANS AND DENTISTS**
While defined separately under NC General Statute 126-5(cl)(8), positions whose required qualifications meeting the licensing standards for Physicians and Dentists in the State of North Carolina will be classified as IRIT. (Required by SO)

**Note:** This category is used for positions not otherwise assigned primary EHRA faculty status and rank.

**EHRA IT PROFESSIONAL CLASSIFICATION DESCRIPTIONS:** As part of the 2017 Appropriations Act, the North Carolina General Assembly expanded the exemptions under the North Carolina Human Resources Act (“EHRA non-faculty” or “EHRA”) to include University information technology professional positions.

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<tr>
<th>Role</th>
<th>Description</th>
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<tbody>
<tr>
<td>IT Analyst/Programmer</td>
<td>Designs, installs, tests, codes, and debugs ad hoc and/or manages existing applications, servers, and infrastructure, including the implementation of new versions of existing software or the design of new software and strategies to support the institution’s mission. Works with functional areas to understand business requirements and implements applications to meet those needs. Works within a variety of software development lifecycles and project management approaches to achieve goals.</td>
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<tr>
<td>IT Business Systems Analyst</td>
<td>Identifies and implements technological solutions with goal of improving operational performance and efficiency. Facilitates implementation of technology solutions in a cost-effective way by determining the requirements of a project or program and communicating them clearly to stakeholders, facilitators, and partners. Liaison between functional offices and technical personnel to elicit requirements, translate requirements to technical specifications, and ultimately ensure the outcome is valuable to the organization.</td>
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<tr>
<td>IT Client Support Manager</td>
<td>Plans, implements, and provides oversight for an IT service area and manages the relationship between the business and the customer/user. Researches and follows industry trends and technologies in order to recommend, provide, and sustain services that enhance business operations. Reviews customer requirements, creates test cases, executes testing plan using testing tools and automation, and tests applications/services developed against the test cases to ensure there are no bugs, requirements are met, and applications/services function properly. Oversees customer portfolio of application/service requests and acts as liaison between IT technicians and customer. Calls on customer leaders regularly to report on work status and listen for upcoming needs. Serves as point of escalation for customer issues and funnel for all work that doesn’t fit into standard operating processes. Works with customers to shepherd projects through governance processes.</td>
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<tr>
<td>IT Database Administrator</td>
<td>Designs, implements, and/or manages various databases to support a variety of programs. Responsible for the performance, integrity, and security of a database. Involved in the planning and development of the database as well as troubleshooting any issues on behalf of the users. Advises management on database concepts, functional capabilities, parameters, and prototypes.</td>
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<tr>
<td>IT Instructional/Classroom Support Professional</td>
<td>Manages support and services for instructional activities such as classroom instruction, capture and delivery of instruction, supporting interactivity (web, phone, and other audio/visual conferencing) and delivery of e-Learning Systems. Plans, designs, analyzes and installs instructional systems in classrooms or teaching lab spaces based on department instructional needs. Provides specific technical expertise to faculty, staff, and students in areas such as instructional operations and e-Learning services.</td>
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<tr>
<td>IT Manager</td>
<td>Manages authority for personnel decisions and has input on departmental budgeting, strategic planning, and procedural changes. Performs complex tasks and leads/directs the work of other employees. May manage and control the contractual relationship with some or all service providers.</td>
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<tr>
<td>IT Network Administrator</td>
<td>Administers network connectivity for Wide Area Networking (WAN) and/or Local Area Networking (LAN). Maintains remote Virtual Private Network (VPN) connections, network security (firewall and intrusion detection/prevention protection), as well as Wi-Fi</td>
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connectivity. Designs network architectures to achieve performance and security constraints. Troubleshoots and resolves networking issues.

<table>
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<tr>
<th>Role</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>IT Project Manager</td>
<td>Develops, monitors, and manages IT projects to include budget, personnel, and equipment. Creates project schedules and coordinates project activities to meet stated budgets and timelines. Implements change management procedures and escalates project risks to leadership.</td>
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<tr>
<td>IT Security Professional</td>
<td>Plans and implements security measures to protect computer systems, networks, and enterprise information. Expected to stay up-to-date on the latest intelligence, including hacker methodologies, in order to anticipate security breaches, with the goal of complying with internal/external information security policies and standards. Monitors emerging products, technologies, or best practices that will improve security for the organization and stakeholders.</td>
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<tr>
<td>IT System Administrator</td>
<td>Identifies and implements technological solutions with the goal of improving operation performance/efficiency. Evaluates the current state of business technology resources and identifies new technologies, or upgrades/enhancements to existing technologies, that have the potential to improve business performance. Conducts cost/benefits and buy/build analysis, presents findings, and makes recommendations. Meets with end users to assess business objectives and define user needs. Ensures that technology is appropriately installed or configured and integrates with legacy solutions.</td>
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<tr>
<td>IT Web Designer/Developer</td>
<td>Designs and/or develops interfaces, layout, and/or coding of all website design elements and provides on-going maintenance. Troubleshoots issues/problems and debugs coding issues. Works with functional areas to understand business requirements and implements applications to meet those needs. Works within a variety of software development lifecycles and project management approaches to achieve goals.</td>
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<tr>
<th>Level</th>
<th>Span of Authority</th>
<th>Supervisory Duties</th>
<th>Independent Authority</th>
<th>Education, Experience, Special Skills (or equivalent education/experience)</th>
</tr>
</thead>
</table>
| I     | Unit(s) or School-/Division-wide | None to few with minimal/local impact; affects typically one system | Some decision-making | · Entry-level with Masters;  
· Bachelors and 0-2 yrs experience |
| II    | School-/Division-Wide or Institution-wide | Few to many (some may be EHRA) | Often makes decisions that can affect school/division or large parts of institution; affects | · Mid-career with Masters and 1-2 yrs experience;  
· Bachelors and 2-4 yrs experience |
<table>
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<tr>
<th>Level</th>
<th>Institution-wide and/or Community</th>
<th>Many (some may be EHRA and/or managers)</th>
<th>Daily decision-making with broader, often institution-wide, impact; affects other systems and/or faculty and staff</th>
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<td></td>
<td>· Mid- to late-career with Masters and 2-4 yrs experience;</td>
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<td></td>
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<td></td>
<td>· Bachelors and 3-5 yrs experience</td>
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· For *management-level roles, also include with the above requirements 1-2 years of supervisory experience.*

· Institutions *may require additional certifications as deemed appropriate for specific job duties.*

· Auditor *positions also may require certification(s).*