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Expanding the Circle:

One Profession, Diverse Perspectives

NCURA Region III & IV Spring Meeting

NCURA REGION III

TradeWinds Island Grand Resort
St. Pete Beach, FL
April 26-29, 2020

-

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Draft Program: Expanding the Circle: One Profession, Diverse Perspectives
Pre-Conference Workshops: April 25-26, 2020
Conference Program: April 26-29, 2020

SCHEDULE AT A GLANCE

Saturday	**April 25, 2020**	**Event**	**Location**
7:00 AM	4:30 PM	Registration	Grand Palm Colonnade
7:30 AM	8:30 AM	Workshop Breakfast	Garden Courtyard
8:30 AM	4:30 PM	Full Day Workshops	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
8:30 AM	12:00 PM	Morning Half-Day Workshops	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
10:30 AM	10:45 AM	Workshop Break	TBD
12:00 PM	1:00 PM	Workshop Lunch	TBD
2:45 PM	3:00 PM	Workshop Break	TBD
Sunday	**April 26, 2020**	**Event**	**Location**
7:30 AM	5:30 PM	Registration	Grand Palm Colonnade
7:30 AM	8:30 AM	Workshop Breakfast	Garden Courtyard
8:30 AM	4:30 PM	Full Day Workshops	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
8:30 AM	12:00 PM	Morning Half-Day Workshops	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
10:15 AM	10:30 AM	Workshop Break	TBD
12:00 PM	1:00 PM	Workshop Lunch	TBD
1:00 PM	4:30 PM	Afternoon Half-Day Workshops	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
2:45 PM	3:00 PM	Workshop Break	TBD
5:00 PM	6:00 PM	Welcome Reception	TBD
8:00 PM	11:00 PM	Hospitality Suite	Horizons
Monday	**April 27, 2020**	**Event**	**Location**
6:00 AM	7:00 AM	Morning Wellness: Yoga	TBD

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7:30 AM	5:00 PM	Registration	Grand Palm Colonnade
7:30 AM	8:30 AM	**Continental Breakfast & Roundtable Discussions**	Banyan Breezeway
8:45 AM	9:00 AM	Conference Welcome	Pavilion
9:00 AM	10:00 AM	Keynote Address: Dr. Vonzell Agosto, USF	Pavilion
10:00 AM	10:15 AM	Break with Exhibitors	Banyan Breezeway
10:15 AM	11:30 AM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
11:30 AM	1:00 PM	Luncheon with Guest Speaker (III and IV together)	Pavilion
1:00 PM	2:15 PM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
2:15 PM	3:30 PM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
3:30 PM	4:00 PM	Break with Exhibitors	Banyan Breezeway
4:00 PM	5:00 PM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
6:00 PM	8:00 PM	Dinner Groups (self pay)	TBD
8:00 PM	11:00 PM	Hospitality Suite	Horizon
Tuesday	**April 28, 2020**	**Event**	**Location**
6:00 AM	7:00 AM	Morning Wellness: Flamingo-Cow Fun Walk	TBD
7:30 AM	4:30 PM	Registration	Grand Palm Colonnade
7:30 AM	8:45 AM	Continental Breakfast & Roundtable Discussions	Banyan Breezeway
9:00 AM	10:15 AM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
10:15 AM	10:45 AM	Break with Exhibitors	Banyan Breezeway
10:45 AM	12:00 PM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
12:00 PM	1:30 PM	Lunch with Regional Business Meetings	RIII and RIV locations TBD
1:30 PM	2:45 PM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
2:45 PM	3:15 PM	Break with Exhibitors	Banyan Breezeway

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3:15 PM	4:30 PM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
6:30 PM	7:00 PM	Reception	Breck Deck
7:00 PM	9:30 PM	RIII-RIV Dinner Celebration	Breck Deck
9:30 PM	12:00 AM	Hospitality Suite	Horizons
Wednesday	**April 29, 2020**	**Event**	**Location**
7:45 AM	8:45 AM	Breakfast	TBD
8:45 AM	10:00 AM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
10:00 AM	10:15 AM	Break with Exhibitors	Banyan Breezeway
10:15 AM	11:30 AM	**Concurrent Sessions & Discussion Groups**	Jacaranda Hall, Island Ballroom, or GPC 2nd Floor
11:30 AM		Meeting Adjourns	

See https://www.tradewindsresort.com/media/user/Tradewinds_65.pdf for venue map. Please note that start times, end times, and exact room locations are still subject to change.

See below for final workshop descriptions and draft descriptions of concurrent sessions and discussion groups.

Saturday, April 25, 2020		
SATURDAY **FULL DAY**: 8:30am-4:30pm	**WS#1**	**NIH Fundamentals (Overview, Federal)** **Workshop Description:** The National Institutes of Health (NIH) Fundamentals provides a foundation in grants from NIH. As NIH is the single largest federal grant-awarding agency, the program is perfect both for someone new to research administration and for research administrators expanding their knowledge of federal funding agencies. The curriculum, a full-day workshop, provides an overview to the procedures and policies essential to preparing successful applications and managing grant awards from the National Institutes of Health. **Workshop Objectives:** ● An overview of NIH including its mission, institutes, and funding focus. Where to locate funding opportunities and navigating through the grant life cycle.

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		● Basics of NIH proposal preparation and submission. NIH funding paths: From pre-doctoral fellowships to large scale research projects. ● Latest Policy Updates Presenter: Diana Rutberg, Chief Grants Management Officer Grants Management Branch Division of Extramural Activities National Institute of Dental and Craniofacial Research E-mail: rutbergd@mail.nih.gov
SATURDAY **AM**: 8:30am-12:00pm	**WS#2**	**Building Resilience to Stress in Yourself and Your Research Administration Team (Advanced, Senior)** **Workshop Description:** Research Administrators work in a high stress, deadline driven occupation, oftentimes providing support to people with little comprehension of the level of responsibility we shoulder. As an individual, or as a leader of a team, there is often little we can do about the stressors that accompany heavy deadlines, severe financial consequences for mistakes, and responsibility without authority. In this interactive workshop we will discuss how to recognize peak stress times, what you can do to build resilience to stress as an individual, and what you can do to help you team build resilience, as well. We will also explore strategies that you may employ to reduce some of the stressors that you may be inadvertently contributing. We will also develop an action plan for reducing and managing the real world stress you are currently experiencing. **Workshop Objectives:** ● Understand common stressors that increase the likelihood of workplace stress. ● Recognize stressors that are endemic to research administration as a profession. ● Discuss stressors that may be unique to your own work environment. ● Understand factors that can build resilience to a high stress environment to develop coping skills. ● Develop both personal and team action plans to both lower stress producers and increase resilience builders.

		Presenter: Jennifer Shambrook Director of Research Programs and Services Office of Research and Commercialization University of Central Florida E-mail: jennifer.shambrook@ucf.edu
SATURDAY **PM**: 1:00pm-4:30pm	**WS#3**	**Lean In: Women in Research Administration Leadership (Overview, Professional Development)** **Workshop Description:** According to a recent survey (Shambrook et al, 2015) women account for 85% of the research administration workforce. Unknown is what percentage hold, or aspire to hold, leadership positions within this field. Regardless of where you are in your current leadership journey, just starting out or well on your way, this workshop will offer practical advice to help women in research administration (RA) achieve their leadership goals. Based on the book "Lean In" by Sheryl Sandberg, and coupled with shared experiences from Research Administrators in leadership positions, this workshop will challenge you to change the conversation from what you can't do, to what you can do. During our time together we will explore obstacles that may hold us back from reaching our leadership potential, potential sources of tapped and untapped strengths, and resources for mapping leadership goals. We will focus on those beliefs that keep us from moving forward on our leadership journeys. While focused on women in leadership, we welcome and encourage all to join us, as the principles to be presented are universal to setting leadership goals. Additionally, male and female leaders can gain insight into real issues that women face on their leadership journeys, thereby becoming more effective leaders to all. **Workshop Objectives:** ● Participants will be able to name the obstacles that hold them back from reaching their leadership potential and identify the strengths they bring to the table. ● Participants will be offered advice on how to shed beliefs that may be holding them back from reaching new leadership heights. ● Participants will be able to locate resources that may assist them on their leadership journey. ● Participants will be able to create a personalized leadership plan using tools provided during the workshop.

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		Presenters: Sue Kelch Senior Financial Specialist Kresge Hearing Research Institute University of Michigan E-mail: suekelch@umich.edu Michelle Schoenecker Senior Proposal Development Manager University of Wisconsin-Milwaukee E-mail: schoene7@uwm.edu David Lynch Consultant E-mail: delynch55@gmail.com
SATURDAY **PM**: 1:00pm-4:30pm	**WS#4**	**Post Award Management: Financial and Administrative Compliance, Best Practices, and Communication Strategies (Intermediate, Post Award)** **Workshop Description:** You have received your signed award, what next? Post award management spans a wide variety of compliance issues. Join us for a comprehensive overview of post-award issues, budget modification, billing and cash management, communication strategies, subrecipient monitoring, effort reporting, project closeout and other best practices. In addition, we will provide strategies for creating standard operating procedures to ensure compliance and consistency. **Workshop Objectives:** • Financial and Administrative Compliance and best practices Developing effective communication strategies • Effective subrecipient monitoring • Creating standard operating procedures to ensure compliance and consistency Presenters: Whitney Lumpkin, CRA Director, Sponsored Programs Accounting Arkansas State University E-mail: wlumpkin@astate.edu

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		Chelsea Gambill, CRA Sponsored Programs Officer, Sponsored Programs Accounting Arkansas State University E-mail: cgambill@astate.edu Ash Pulliam Sponsored Programs Officer, Sponsored Programs Accounting Arkansas State University E-mail: apulliam@astate.edu
SATURDAY **PM**: 1:00pm-4:30pm	**WS#5**	**The Lifecycle of NIH Institutional Training Grants: An interactive workshop from Application to Closeout (Overview, Pre Award)** **Workshop Description:** This workshop will cover multiple areas associated with NIH NRSA Training Grant (T32) proposals and awards. Following a brief introduction about NIH NRSA Training grant programs, we will breakdown the workshop into three basic components: 1. Pre-award proposal preparation (including required data tables), 2. Award management best practices (including xTrain use) and 3. Post-award considerations upon both annual and award closeout. **Workshop Objectives:** ● Interpret instructions of a T32 grant ● Manage the appointments and financials of a T32 award ● Appoint and terminate trainees within Xtrain ● Understand allowable costs for T32 grants ● Understand requirements for annual progress reports (RPPR)* ● Complete tuition obligations for annual closeouts ● Understand where to find resources to aid in the administration of T32 programs *xTRACT will be covered briefly as it relates to the RPPR requirement Presenters: Mallory Musolf Associate Director Office of Training Grant Support, School of Medicine and Public Health University of Wisconsin-Madison E-mail: musolf@wisc.edu

		Jenny Dahlberg Senior Administrative Program Specialist School of Veterinary Medicine University of Wisconsin-Madison E-mail: jenny.dahlberg@wisc.edu
		Sunday, April 26, 2020
SUNDAY **FULL DAY**: 8:30am-4:30pm	**WS#6**	**Export Control (Beginner/Basic, Compliance)** **Workshop Description:** In this workshop, you will be provided with a brief overview of the export control regulations and the 2019-2020 updates to the regulations. You will learn how to detect and manage export control issues within your institution. In addition, you will learn about the best practices related to export control compliance, including contract negotiation and managing institutional risk. Finally, we will end the day with a few case studies. Note: Instead of or in addition to a full day workshop, I would be willing to do a concurrent session on any of the above export control topics. **Workshop Objectives:** • Participants will learn about the key export control regulations, including the ITAR, EAR, OFAC, and DOE requirements. • Participants will learn about proposed and final regulatory updates to the ITAR, EAR, and OFAC. • Participants will learn how to establish and tailor university policies and procedures to meet the above regulatory requirements. Presenter: Ashley Guritza Export Control Analyst, Office of Research & Commercialization University of Central Florida E-mail: Ashley.Guritza@ucf.edu
SUNDAY **FULL DAY**: 8:30am-4:30pm	**WS#7**	**Internal Controls and the Research Administrator (Overview, Compliance)** **Workshop Description:** The concept of Internal Controls is pervasive in 2CFR 200 and is delineated in §200.303.So what does the requirement of effective Internal Controls (IC) mean to research administrators and what

		role does the research administrator have in IC implementation? Are the key responsibilities clearly defined at your institution? Does management's commitment to competence ensure that staff receive adequate training to perform their duties? Do operating policies and procedures exist and are they clearly written and communicated? This workshop will discuss what the Federal agencies expect from IHE's whom receive Federal funding and what the control environment should look like. Join us as we discuss the control environment, risk assessment, control activities, information and communication, and monitoring. The attendee should come prepared for a lively exchange of IC processes and how they affect the research administrator in their responsibilities in Federal Award administration. **Workshop Objectives:** ● Become more aware of the IC and how they impact the work of the research administrator. ● As Part 6 of the Federal Compliance Supplement is not a checklist, the attendees will come away with a perspective of how IC are addressed at other institutions from the open sharing of the various approaches used. ● Go back to your institution better equipped to reasonably ensure compliance with Federal statutes, regulations and the terms and conditions of the Federal Award. Presenters: Kay Gilstrap Associate Director of Business Operations, Center for Molecular & Translational Medicine Georgia State University E-mail: kgilstrap@gsu.edu Rob Roy Director, BOR Sponsored Programs Georgia Institute of Technology E-mail: rob.roy@business.gatech.edu Pamela "Mo" Valentine Assistant Vice President for Research Ohio University E-mail: valentip@ohio.edu
SUNDAY **FULL DAY**: 8:30am-4:30pm	**WS#8**	**Introduction to Research Administration & Pre-Award Fundamentals (Beginner/Basic, Pre Award)**

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		Workshop Description: Engage in activities and discussions that address roles and responsibilities in research administration and the lifecycle of an award. Topics will include sponsor and award types, the federal costing principles, and how to navigate Uniform Guidance (2CFR200). Spend time on finding funding, dissecting program announcements, assembling proposals and budgets, submitting proposals, and accepting awards. **Workshop Objectives:** ● Identify how their role fits into the wider research administration enterprise and supports the lifecycle of a project ● Understand common award mechanisms and basics of federal funding principles ● Develop strategies for assisting faculty with proposal and budget development ● Identify review techniques to protect the institution and lead to a smooth project implementation Presenters: Bonniejean Zitske Assistant Director, Research Financial Services University of Wisconsin-Madison E-mail: bzitske@rsp.wisc.edu Diane Hillebrand Grants Manager, Research Affairs University of North Dakota E-mail: diane.hillebrand@UND.edu Shannon Sutton Director, Office of Sponsored Projects Western Illinois University E-mail: SM-Sutton@wiu.edu Heather Offhaus Director, Grant Services & Analysis University of Michigan Medical School E-mail: hmills@umich.edu
SUNDAY **FULL DAY**: 8:30am-4:30pm	**WS#9**	**Introduction to Research Administration & Post-Award Fundamentals (Beginner/Basic, Post Award)**

		Workshop Description: Engage in activities and discussions that address roles and responsibilities in research administration and the lifecycle of an award. Topics will include sponsor and award types, the federal costing principles, and how to navigate Uniform Guidance (2CFR200). The post-award portion of this session will highlight award management, pitfalls of cost transfers, effort distributions, subcontracts, and close out. **Workshop Objectives:** ● Identify how their role fits into the wider research administration enterprise and supports the lifecycle of a project ● Understand common award mechanisms and basics of federal funding principles ● Review best practices for managing funded projects from receipt to closeout ● Identify how to interpret the requirements of a grant agreement ● Explore the proper way to handle subrecipient agreements and monitoring Presenters: Bonniejean Zitske Assistant Director, Research Financial Services University of Wisconsin-Madison E-mail: bzitske@rsp.wisc.edu Diane Hillebrand Grants Manager, Research Affairs University of North Dakota E-mail: diane.hillebrand@UND.edu Shannon Sutton Director, Office of Sponsored Projects Western Illinois University E-mail: SM-Sutton@wiu.edu
SUNDAY **AM**: 8:30am-12:00pm	**WS#10**	**So you want to learn how to write proposals: A Beginner's Workshop** **Workshop Description:**

		Are you interested in taking a step back from the daily grind of proposal review and processing? Curious about the ways in which you can support faculty before a final draft of a proposal crosses your desk? Then join us for an interactive workshop on proposal development that starts with the inception and nurturing of your faculty member's idea while addressing funding opportunities, editorial support, RFP review, peer review and other areas that impact our faculty as they consider writing a proposal. Proposal components will be broadly discussed but the main focus of the workshop will be on the basics of grantsmanship and the myriad ways in which we, as research administrators, can help our faculty develop competitive proposals. **Workshop Objectives:** ● Attendees will gain an understanding and appreciation of the grantsmanship process; ● Attendees will learn about tools and resources available to support faculty in proposal development; ● Attendees will gain confidence in their ability to help develop competitive proposals Presenters: Michelle Schoenecker Senior Proposal Development Manager University of Wisconsin-Milwaukee E-mail: schoene7@uwm.edu Tony Ventimiglia Acting Executive Director, Research Administration Services Director, Proposal Services & Faculty Support Auburn University E-mail: ventiaf@auburn.edu
SUNDAY **AM**: 8:30am-12:00pm	**WS#11**	**Effective Contract Negotiation: Providing Tools for Success (Intermediate, Pre Award)** **Workshop Description:** Negotiating sponsored research agreements can appear to be challenging on the surface. This workshop will assist with removing some of the stress surrounding contract negotiation and will enhance your understanding by developing a strong foundational knowledge of the common terms and conditions included within sponsored research agreements. This will help enable you to recognize which terms your institution is able to

		accept and which terms need to be altered or removed. Tips and suggested alternate language will be provided that you can use as a reference as you build your negotiation skills. **Workshop Objectives:** ● Develop a solid understanding of contract terms and conditions most commonly seen in sponsored research agreements. ● Learn strategies to negotiate favorable terms that align with your institution's status and policies. ● Become familiar with key Federal Acquisition Regulation (FAR) clauses in Federal Government contracts that are meant for educational institutions. ● Identify alternate language as a path forward when negotiating terms and conditions most institutions should avoid. Presenters: Chase Bunger, JD Senior Compliance Manager University of Missouri E-mail: bungerc@missouri.edu Brenda Leuenberger Senior Compliance Manager University of Missouri E-mail: leuenbergerb@missouri.edu Christina Cochrane Federal Contracting Program Coordinator Virginia Tech E-mail: ccochrane@vt.edu
SUNDAY **AM**: 8:30am-12:00pm	**WS#12**	**Introduction to Research Administration (Beginner/Basic, Pre Award)** **Workshop Description:** Engage in activities and discussions that address roles and responsibilities in research administration and the lifecycle of an award. Topics will include sponsor and award types, the federal costing principles, and how to navigate Uniform Guidance (2CFR200). **Workshop Objectives:**

		• Identify how their role fits into the wider research administration enterprise and supports the lifecycle of a project • Understand common award mechanisms and basics of federal funding principles Presenters: Bonniejean Zitske Assistant Director, Research Financial Services University of Wisconsin-Madison E-mail: bzitske@rsp.wisc.edu Diane Hillebrand Grants Manager, Research Affairs University of North Dakota E-mail: diane.hillebrand@UND.edu Shannon Sutton Director, Office of Sponsored Projects Western Illinois University E-mail: SM-Sutton@wiu.edu
SUNDAY **AM**: 8:30am-12:00pm	**WS#13**	**NSF Discussion on Pre-Award, Award, Cash Management and Post-Award Processes (Overview, Federal)** **Workshop Description:** This workshop provides an overview of the phases of NSF's Grants pre-award to post-award processes. In addition to providing valuable tips and strategies to ensure a successful grant, participants have the opportunity to ask NSF staff questions on budgetary items and policies related to grant management. We will also review ACMS payment processes. This workshop also will help universities that do not currently have NSF grants to start looking into the opportunity. **Workshop Objectives:** • Participants will increase their understanding of the NSF"s grant award and cash management process; • Participants will increase their knowledge of ACMS payment processes; • Participants will develop increased rapport between the University Grantee POC's and the NSF staff.

		Presenters: Dorothy Battle Accountant, Grantee Cash Management Section National Science Foundation E-mail: dbattle@nsf.gov Vanessa Richardson Division of Grants and Agreements National Science Foundation E-mail: vlrichar@nsf.gov
SUNDAY **AM**: 8:30am-12:00pm	**WS#14**	**Designing a Career Path in Research Administration (Overview, Professional Development)** **Workshop Description:** In this half-day workshop, participants will engage in activities, discussion, and exercises to chart a path for their own career development within the field of Research Administration. **Workshop Objectives:** ● Learn about various types of jobs and career pathways in Research Administration; ● Explore through discussion, activities, and exercises potential opportunities for career advancement within the field and how to overcome obstacles to professional goals; and ● Design a personalized five-year life plan. Presenters: Suzanne Rivera, PhD, MSW Vice President for Research, Office of Research and Technology Management Case Western Reserve University E-mail: suzanne.rivera@case.edu Melody Bell Assistant Vice President for Academic Information Systems UT Southwestern Medical Center E-mail: Melody.Bell@UTSouthwestern.edu
SUNDAY **AM**: 8:30am-12:00pm	**WS#15**	**Time Management for Research Administrators: Going from Frazzled to Focused (Overview, Professional Development)**

		Workshop Description: "Time isn't the main thing. It's the only thing." -Miles Davis. No matter who you are, you only have 24 hours in a day! Have you ever looked at someone and wondered how they can get so much accomplished in a single day? Are you often challenged or overwhelmed by your workload and struggle to find a work/life balance? Come join us as we walk through the following topics and provide assessment tools, hands-on activities, as well as tips on how to go from frazzled to focused! **Workshop Objectives:** ● By the end of this workshop, participants will: Understand how well they manage their time and discover methods to clarify their role and expectations of tasks; ● Identify professional and personal goals as well as how to properly prioritize and achieve them; ● Recognize why they procrastinate and how to avoid it; ● Learn habits to tackle large projects and manage interruptions; ● Establish achievable boundaries that can provide an impact on their work/life balance. Presenters: Deanna Hendrickson Research Education Manager Georgia Institute of Technology E-mail: deanna.hendrickson@osp.gatech.edu Calleen Roper Assistant Director, Budget & Financial Services Florida State University E-mail: calleen.roper@med.fsu.edu
SUNDAY **PM**: 1:00pm-4:30pm	**WS#16**	**Pre Award Fundamentals (Beginner/Basic, Pre Award)** **Workshop Description:** Spend time on finding funding, dissecting program announcements, assembling proposals and budgets, submitting proposals, and accepting awards. **Workshop Objectives:** ● Develop strategies for assisting faculty with proposal and budget development ● Identify review techniques to protect the institution and lead to a smooth project implementation

		Heather Offhaus Director, Grant Services & Analysis University of Michigan Medical School E-mail: hmills@umich.edu Diane Hillebrand Grants Manager, Research Affairs University of North Dakota E-mail: diane.hillebrand@UND.edu
SUNDAY **PM**: 1:00pm-4:30pm	**WS#17**	**Post Award Fundamentals (Beginner/Basic, Post Award)** **Workshop Description:** This session will highlight award management, pitfalls of cost transfers, effort distributions, subcontracts, and close out. **Workshop Objectives:** ● Review best practices for managing funded projects from receipt to closeout ● Identify how to interpret the requirements of a grant agreement ● Explore the proper way to handle subrecipient agreements and monitoring Bonniejean Zitske Assistant Director, Research Financial Services University of Wisconsin-Madison E-mail: bzitske@rsp.wisc.edu Shannon Sutton Director, Office of Sponsored Projects Western Illinois University E-mail: SM-Sutton@wiu.edu
SUNDAY **PM**: 1:00pm-4:30pm	**WS#18**	**Addressing and Overcoming Implicit Bias to Build Inclusion and Propel Faculty Research to the Next Level (Overview, Professional Development)** **Workshop Description:** Bias consists of attitudes, behaviors, and actions that are prejudiced in favor of or against one person or group compared to another. Implicit bias is a form of bias that occurs automatically and unintentionally, that nevertheless affects judgments, decisions, and behaviors. Research has shown that implicit bias can

		pose a barrier to recruiting and retaining a diverse scientific workforce. The good news is that implicit bias can be mitigated with awareness and effective bias-reduction strategies. In this half-day, interactive workshop, participants will learn to identify and address implicit bias in the workplace. Participants will also increase their toolbox with identified tools and techniques to overcome implicit bias in an effort to build inclusion. **Workshop Objectives:** ● Participants will gain an understanding of implicit bias. ● Participants will become self-aware of their own biases. ● Participants will be able to identify implicit bias. ● Participants will have the ability to effectively address implicit bias. ● Participants will utilize their new tools to overcome implicit bias. Presenters: Laneika Musalini Director of Grants Development Tri-County Technical College E-mail: lmusalin@tctc.edu Natasha Williams Associate Director, Research Development and Strategic Initiatives Kennesaw State University E-mail: nstark3@kennesaw.edu Shanta Mackinnon Research Technician North Carolina Central University E-mail: smackinnon@nccu.edu
SUNDAY **PM**: 1:00pm-4:30pm	**WS#19**	**Navigating the Uniform Guidance for the Lifecycle of the Award (Beginner/Basic, Compliance)** **Workshop Description:** The Uniform Guidance (2CFR200) provides a wealth of information throughout the life cycle of the award. This guidance document will help you from the time you are reading the solicitation, creating the proposal, accepting and managing the award, closeout, and even responding to requests for information after closeout. In this workshop, we will use the Uniform Guidance as our compass to circumnavigate an award from the point of the

		agency creating the call for proposals, through our obligations for audit or Freedom of Information Act requests after the award has ended. We will apply what we have learned to some actual thought provoking proposal and award management issues. Join this interactive workshop to increase your own understanding of the document that guides cost principles for all Federal Awards. **Workshop Objectives:** ● Familiarize yourself with the various sections of the Uniform Guidance. ● Understand the purpose of the different sections of the Uniform Guidance and how they relate to your sponsored awards. ● Identify and memorize the four overarching rules of the cost principles of all Federal Awards. ● Apply overarching cost principles to "real life" scenarios you may encounter in your research administration role. ● Analyze case studies from common research administration challenges to determine which specific Uniform Guidance rules would apply in that particular circumstance. Presenter: Jennifer Shambrook Director of Research Programs and Services Office of Research and Commercialization University of Central Florida E-mail: jennifer.shambrook@ucf.edu
SUNDAY **PM**: 1:00pm-4:30pm	**WS#20**	**Unlocking the Keys to Unforgettable Presentations for Research Administrators (Overview, Professional Development)** **Workshop Description:** Strong presentation skills are essential to your success as a research administrator. But, do you have them? Whether you are presenting to 5 people or 500 people, building an effective presentation begins long before you take the stage. Assessment, preparation, and planning are essential if you want to design an engaging presentation. Join us for a hands-on, interactive session where you will obtain tools and learn strategies to increase the effectiveness of your next presentation. We will also explore communication and self-awareness practices to use when you are in front of an audience as well as technology-based tools to enhance your presentation.

		Workshop Objectives: • After completing this workshop, attendees will be able to: Explain the unique needs of adult learners. • Follow popular instructional design methods. • Explain the difference between learning objectives and design objectives. • Apply simple techniques to create a participant-centered presentation. • Identify strengths and areas for improvement as presenters. • Incorporate different technology to enhance presentations. Presenters: Melanie Hebl Education Coordinator University of Wisconsin-Madison E-mail: mrjacobs3@rsp.wisc.edu Rashonda Harris Director of Post Award Emory University E-mail: rharr30@emory.edu

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SESSION TITLES AND PRESENTERS AS OF 11/21/19:

Compliance: Sessions related to all areas of research compliance, including risk assessment, animal care and use, human subjects, conflict of interest, export controls, data management, responsible conduct of research, environmental health and safety, etc.
Track Leads:
Region III: Melanie Clark, Georgia Institute of Technology
Region IV: Jamie Szabo, University of Missouri

Session Title (CS= Concurrent Session; DG = Discussion Group)	**Presenter(s)**
Preventing Undue Foreign Influence: How We Can All Help (DG)	Kairi Williams (Drexel University) and Heather Little
Restricted Party Screenings (CS)	Becky Hundley (Hundley Consulting Group, LLC), Thomas Andrukonis (U.S. Bureau of Industry & Security) and Kate Stoan (The Ohio State University)
Metrics Jeopardy! (CS)	Rashonda Harris (Emory University)
Policy Development and Implementation (CS)	Kimberly Johns (University of Florida)
Negotiating Intellectual Property Language for Industry Sponsored Research Agreements	Chase Bunger (University of Missouri)
Developing a Research Administration Infrastructure (CS)	Tammy Jobes (Gillette Children's Specialty Healthcare)
University Case Studies in International Research Collaborations: Stories of Success (CS)	Christine Hadad, Melissa Mullaney (University of Florida) and John Kington
An Insider's Guide to Laboratory Compliance: Biologicals, Chemicals, Lasers, and Radiation (CS)	Amy Ossola-Phillips and Dr. Amanda Haley (University of Texas at San Antonio)

An Insider's Guide to Laboratory Compliance: Biologicals, Chemicals, Lasers and Radiation
Compliance - Overview Concurrent Session

Compliance with various laboratory requirements is essential for campus safety and meeting federal award terms and conditions. Learn what pre- and post-award actions can best support your university's research programs.

Amy Ossola-Phillips, The University of Texas at San Antonio - Director
Amanda Haley, The University of Texas at San Antonio 0 Director

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Preventing Undue Foreign Influence: How We Can All Help
Compliance - Overview — Discussion Group

Feeling overwhelmed by the constant news updates on foreign influence and academia? Confused by evolving sponsor guidance and the renewed emphasis on reporting research support? Come join us as we explore what foreign influence "is," tackle some of the myths and misconceptions that administrators and faculty may have, provide some tips on how to identify indicators that a researcher may be engaged in in appropriate behaviors, and offer some strategies to implement a comprehensive response that's consistent with values important to American institutions of higher education. We hope to engage research administrators from all shapes and sizes of institutions, across every functional area, and with all levels of expertise so that we can learn together.

Heather Little, Director, Export Compliance and Research Security - University of Missouri
Kairi Williams, Associate Vice Provost of Operations and Compliance and Research Integrity Officer - Drexel University

Negotiating Intellectual Property Language for Industry Sponsored Research Agreements
Compliance - Intermediate — Concurrent Session

Negotiating Intellectual Property language in industry sponsored (non-clinical trial) research agreements can be difficult for even the most seasoned pre-award administrator. This session will introduce basic and intermediate concepts of intellectual property rights as they relate to industry sponsored research, why it's important to negotiate these clauses well and how to handle these negotiations with sponsors.

- Understand the basic and intermediate concepts of IP law and related clauses, both from a University and Industry perspective
- Understand the implication of IP restrictions
- Be able to identify troublesome IP clauses
- Be able to offer alternatives

Chase Bunger, Research Contracts Manager - University of Missouri

Developing a Research Administration Infrastructure
Compliance - Overview — Concurrent Session

This session will discuss the elements and activities involved in developing and building a research infrastructure at a healthcare organization.

- Discuss vital elements of a strong research infrastructure
- Conducting a baseline assessment
- Developing a timeline for implementation
- Integration of essential services, departments/divisions, and people

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- Strategic initiatives

Tammy Jobes, Sponsored Projects Administrator - Gillette Children's Specialty Healthcare

Metrics Jeopardy
Compliance - Overview Concurrent Session

Are you ready for the best most interactive, engaging session EVER?! This session will offer participants nine metric related topics to choose from. Upon selection, the presenter will cover the benefit, strategy for leverage and a best practice for each metric.

The metrics that will be covered are, Invoicing, Financial Reporting, Turnaround time(s), Customer Services, Workload, Performance, Training, On-boarding and a wildcard which will be decided upon by polling the participants

- Attendees will gain insight on how to develop, use and strategize metrics for effectiveness.

Rashonda Harris, Director of Post Award- Emory University

University Case Studies in International Research Collaboration: Stories of Success
Compliance - Overview Concurrent Session

Due to the current political climate, international research collaboration has come under increased scrutiny by the federal government. The presentation will provide case studies of what universities are doing to handle the new regulations and outside activity disclosures. We will provide examples of what's going well in worldwide research collaboration as well as stories from other universities that clearly required further foreign influence investigation and what the universities did in reaction to close gaps in the review process.

- Identify positive international collaborative relationships
- Reviewing possible risks involved with international research without impeding an exchange of knowledge
- Discuss peer experiences in relation to reviewing multinational partnerships

Christine Hadad, Sponsored Programs Administrator - University of Florida
Melissa Mullaney, Sponsored Programs Administrator - University of Florida

Restricted Party Screening
Compliance - Basic Concurrent Session

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Explaining the importance of screening parties involved in contracts, export transactions and other university research activities that involve export control regulations. The session will include a discussion of different methods to screen and issues to consider for an export compliance officer or research administrator.
• To understand how, who and when to screen parties that the university comes into contact with in the US or abroad that are subject to the Export Administration Regulations.
Thomas Andrukonis, Director, Export Management and Compliance Division - US Dept of Commerce/BIS Becky Hundley, President - Hundley Consulting

Departmental: Sessions of interest to research administrators who report to an academic unit, research center, lab, or even a single PI.
Track Leads:
Region III: Lacey Rhea, University of Florida
Region IV: Kristin Harmon, University of Wisconsin- Madison

Session Title (CS= Concurrent Session; DG = Discussion Group)	**Presenter(s)**
Branching Out 2.0 The Transitional Journey Continues: Moving from a Centralized to Decentralized Research Office (CS)	Ginny Pellam, Elise Dantuma, and Tamara Gabrus (University of Central Florida)
Speaking the Language of Your Pre / Post-Award Counterparts (CS)	Kimberly Johns and Brittany Milito (University of Florida)
A Day in the Life of a Departmental Research Administrator: Managing Multiple Projects, PIs, and Your Time (CS)	Kay Gilstrap (Georgia State University) and Savannah Hulon (University of South Carolina)
Effective PI Meetings (CS)	Kelly Wilder and Brittini Balch (University of Florida)
A Rose by Any Other Name: Research Centers, Service Centers, and Hubs (CS & DG)	Sarah Pratt (Western Michigan University) and Lacey Rhea (University of Florida) and Kristin Harmon (University of Wisconsin-Madison)
Grant Toolbox: The Essential Tools for Department Administrators (DG)	Beth McClendon (Washington University in St. Louis)
Other Duties as Assigned (DG)	Jaime Petrasek (Virginia Commonwealth University)

Effective PI Meetings Departmental - Intermediate Concurrent Session
Whether it's in person or on the phone, meetings with your faculty are important and can lay a foundation of trust and understanding. In this session, you will learn tips and tricks to have effective PI meetings.

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Kelly Wilder, Assistant Director - University of Florida
Rodrigo Venegas, Assistant Director- University of Florida

Branching Out 2.0 The Transitional Journey Continues: Moving from a Centralized to Decentralized Research Office
Departmental - Overview | Concurrent Session

Two years ago we brought you a session that discussed what you needed to consider when transitioning from a centralized to decentralized Research Office. We are back to bring you an update on our journey. We will look at the roadblocks, detours, traffic jams and scenic views that we have encountered in this journey of transition and adaptation.

- Managing items that you thought were not issues before but have now become issues.
- Determining who and how to clearly disseminate the relevant information to the appropriate parties involved
- Developing a strong decentralized research group to have a continued voice at the table for university wide decisions.

Giny Pellam, Associate Director for Research - University of Central Florida
Elisa Dantuma, Assistant Director - University of Central Florida
Tamara Gabrus, Program Director - University of Central Florida

Grant Toolbox: The Essential Tools for Department Administrators
Departmental - Overview | Discussion Group

A discussion geared to provide useful tools that will help research administrators. To encourage a one-stop-shop to set up within your workspace by providing models, checklists, websites, email lists, etc to help you and your team to promote consistency and efficiency. Having good tools is vital when navigating through the world of research administration.

Beth McClendon, Research Administrator - Washington University in St. Louis

"Other Duties As Assigned"
Departmental - Overview | Discussion Group

Join us for a lively and entertaining discussion group focused on the non-RA functions that many research administrators (or non-RAs) are responsible for at the departmental level, particularly in smaller departments/institutions. Attendees will discuss how to balance RA and non-RA work in a deadline driven environment, how to delegate where possible, how to tap other resources within their units to distribute work more appropriately, and how to keep smiling and laughing throughout the day.

Jaime Petrasek, Director of Research Administration - Virginia Commonwealth University
Derik Jones, Program Management - The Lundquist Institute (Formerly LABIOMED)

Speaking the Language of Your Pre/Post-Award Counterparts
Departmental - Basic — Concurrent Session

Talking with your counterparts can be challenging if you are unsure of what they need or what they are asking, especially with acronyms running our everyday lives in research administration. In this session, we will discuss ways to bridge the gap between pre and post award management when a department has split duties. We will also cover ways to open lines of communication and show tips in communication to overcome a variety of obstacles.

- Discuss ways to bridge the gap between Pre and Post Award
- Discover ways to open lines of communication within the department
- How to optimize your use of email as a tool to organize projects (and avoid that feeling of despair when checking your inbox!)

Kimberly Johns, Research Administrator - University of Florida
Brittany Milio, Research Administrator - University of Florida
Micah Herron, Research Administrator - University of Florida

A Day in the Life of a Departmental Research Administrator: Managing Multiple Projects, PIs, and Your Time
Departmental - Overview — Concurrent Session

The departmental administrator is on the front line of research administration. On any given day you, the departmental administrator, can be expected to assist with proposal submissions – usually not within the optimal 10 day window – manage post-award activities such as sub-awards, cost transfers, Pcard purchases, travel, financial analysis, etc. all with multiple interruptions from faculty, the central office, the Dean's office, and of course, email. How do you prioritize? How do you structure your day to complete tasks but allow flexibility for the many last minute emergencies? This session will offer best practices on how to organize multiple proposals and projects simultaneously, and then make measurable, encouraging progress on them all. Strategies for (i) efficiently prioritizing tasks, (ii) strategies for time-saving, and (iii) optimizing email communication will be highlighted. Bring your questions and tips for a lively discussion!

Participants will learn:

- Tips to prioritize projects to maximize the breadth and depth of service provided to constituents
- Tips to structure your workday to make measurable progress on multiple projects, even last minute "emergencies"
- How to optimize your use of email as a tool to organize projects (and avoid that feeling of despair

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when checking your inbox!)
Kay Gilstrap, Assistant Director, Business Operations - Georgia State University Savannah Hulon, Post-Award Administrator - University of South Carolina

Federal: Sessions related to funding opportunities, rules, and regulations for federal grants and contracts.
Track Leads:
Region III: Greg Adams, Broward College
Region IV: Michelle Schoenecker, University of Wisconsin – Milwaukee

Session Title (CS= Concurrent Session; DG = Discussion Group)	**Presenter(s)**
A Program Officer's Perspective on NSF Funding (CS)	Sam Scheiner (NSF)
National Science Foundation's Research.gov Modernization (CS)	Stephanie Yee (NSF)
NSF Best Practices of Award and Financial Administration (CS)	Dorothy Battle (NSF)
NIH Update (CS)	Dede Rutberg (NIH)
What I Learned as a Program Support Manager at NSF… and What You Should Know (DG)	Greg Adams (Broward College) and Michelle Schoenecker (University of Wisconsin-Milwaukee)
Yikes! Our New Grant Earns… Program Income?! (DG)	Darren Howard (Moraine Valley Community College)
Helping Faculty Prepare for the NSF CAREER Program (CS)	Sue Grimes (Purdue University) and Beth Hodges (Florida State University)
USDA Rural Development Telecommunications Program Loans and Grants (CS)	Andrew Hayes, USDA

USDA Rural Development Telecommunications Program Loans and Grants Federal - Overview — Concurrent Session
Presentation of USDA telecommunications loan and grant programs
• To provide an overview of the ReConnect Broadband Loan and Grant Program, the Rural Broadband Access Loan Program and the Distance Learning and Telemedicine Grant Program
Andrew Hayes, General Field Representative, FL, GA, PR, & VI - United States Department of Agriculture (USDA)

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National Science Foundation's Research.gov Modernization
Federal - Overview Concurrent Session

Do you want to reduce your administrative burden by preparing proposals with a user-friendly and intuitive system? Are you interested in uploading documents instantly and with real-time compliance checks? Get an in-depth look at the exciting new features of the National Science Foundation's Research.gov proposal preparation and submission system. Don't miss this opportunity to learn how you can influence the future of proposal submission.

- Attendees will learn how to perform basic tasks in the new proposal submission modernization system, learn about the advantages of submitting through this system, and learn what features are coming soon.

Stephanie Yee, IT Project Manager - National Science Foundation

Yikes! Our New Grant Earns... Program Income?!
Federal - Overview Discussion Group

This Discussion Group session will engage participants in conversations with their peers about their experiences, trials and tribulations of implementing program income accounting practices or strengthening an existing program income practice to ensure compliance with both Uniform Guidance and federal sponsor program income guidelines. Participants will be asked to share with the group their institution's approach to the management of program income and any perils and pitfalls to implementing awards with that generate program income.

- Objective 1: What constitutes program income and what income does not meet the federal definition of program income
- Objective 2: Discuss methods to identify Program Income in the Pre Award Phase vs Finding out about it in the Post Award Phase
- Objective 3: Potential risks of not implementing program income compliance measures
- Objective 4: Potential risks of implementing inadequate program income compliance measures
- Objective 5: Common division of roles related to program income
- Objective 6: "Tricks of the Trade" to balance Investigator plans to amass program income as discretionary dollars with compliant accounting treatment of program income

Darren Howard, Manager Grants Accounting and Compliance - Moraine Valley Community College
Patrick Fraser, Grants and Operations Manager, Georgia Institute of Technology

A Program Officer's Perspective on NSF Funding

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Federal - Overview Concurrent Session

The submission, review and award processes at NSF can be confusing and hard to navigate. Sam Scheiner has been a program officer in the Directorate for the Biological Sciences for more than 21 years. He will provide an overview of the research-funding directorates at NSF, describe the various modes of review, and discuss the various ways that program officers interact with researchers and sponsored projects offices. The session will be interactive with ample time for questions and discussion.

- Participants will understand the how the Directorates fund research at NSF.
- Participants will understand how the Principal Investigators at their institutions can better interact with NSF program officers.
- Participants who work in sponsored project offices will learn how to optimize their interactions with NSF program officers.

Sam Scheiner, Program Director, Division of Environmental Biology (BIO/DEB) - National Science Foundation

Helping Faculty Prepare for the NSF Career Program

Federal - Basic Concurrent Session

The NSF CAREER program is a highly competitive award for junior faculty that focuses on creative research and education efforts. Research Administrators can help faculty increase their chances of success by leveraging available tools and resources as well as provide their own unique twists to help faculty prepare competitive proposals. This session will provide an overview of various approaches, resources and tools that RAs can implement in their own institutions. Participants will be invited to share their own creative approaches, as well.

- - Understand the purpose and importance of the NSF CAREER program to faculty
- - Learn about proven approaches and best practices for the NSF CAREER
- - Develop strategies to help faculty prepare for submission to the NSF CAREER program

Sue Grimes, Assistant Director, Research Development - Purdue University
Beth Hodges, Director, Research Development - Florida State University

National Science Foundation's Research.gov Modernization

Federal - Overview Concurrent Session

Do you want to reduce your administrative burden by preparing proposals with a user-friendly and intuitive system? Are you interested in uploading documents instantly and with real-time compliance checks? Get an in-depth look at the exciting new features of the National Science Foundation's Research.gov proposal preparation and submission system. Don't miss this opportunity to learn how you can influence the future of proposal submission.

- Participants will learn how to perform basic tasks in the new proposal submission modernization system.
- Participants will learn about the advantages of submitting through this system.
- Participants will learn which features are coming soon.

Stephanie Yee, IT Specialist - National Science Foundation

NSF Best Practices of Award and Financial Administration
Federal - Overview — Concurrent Session

This session provides award strategies and best practices to ensure a successful award administration. We will review award management and financial guidelines to help you work smarter, not harder.

- Participants will learn best practices for award administration and post-award;
- Participants will increase their understanding of the NSF's grants award and cash management process
- Participants will develop increased rapport between the University Grantee POC's and the NSF staff.

Dorothy Battle, Accountant, Grantee Cash Management Section - National Science Foundation
Vanessa Richardson, Lead Grant and Agreement Specialist - National Science Foundation

NIH Update
Federal - Overview — Concurrent Session

This session provides an opportunity to learn what is new and what is being developed within the National Institute of Health's (NIH) programs, policies, and budgets. In this comprehensive review, participants will learn about the newest policy updates and how their respective institutions may be impacted. Participants will also have the opportunity to ask questions about new and existing policies and procedures. Topics include recent and upcoming changes to NIH policy, compliance requirements, and much more.

- Participants will learn about NIH's budget priorities
- Participants will learn about new policies and compliance initiatives.
- Participants will gain insight into current issues at NIH.

Dede Rutberg, Chief Grants Management Officer, Grants Management Branch

What I Learned as a Program Support Manager at NSF and What You Should Know
Federal - Basic — Discussion Group

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In the hyper-competitive federal grant world, principal investigators and research administrators alike want to know the inner workings of a federal agency to either confirm or dispel the myths we may hold about getting a proposal funded or managing the grant award and avoiding audits. Gregory Adams spent 27 years at the NSF in a variety of program support roles, and in his current position as a Grants Compliance manager at Broward College, he has a unique perspective of how research administrators can best work with program officers, and what program officers need from research administrators. Come join this lively discussion group for an insider's view of NSF and to learn how research administrators can help program officers and their staff do their jobs more effectively.
Gregory Adams, Grants Compliance Manager - Broward College Michelle Schoenekcer, Senior Proposal Development Manager - University of Wisconsin - Milwaukee

Human Relations in Research Administration: This track focuses on developing more inclusive and collaborative workspaces, including improved interactions with stakeholders and colleagues, ways to improve workplace morale, conflict resolution, and constructive conversations.
Track Lead:
Region III: Ashley Whitaker, Nova Southeastern University

Session Title and Type (CS= Concurrent Session; DG = Discussion Group)	**Presenter(s)**
Bridging Relationships Across Generational Lines (CS)	Kay Gilstrap (Georgia State University)
Difficult People: Lessons from a Social Worker turned Research Administrator (CS)	Kelly Walters and Beth Pasikowski (Grand Valley State University)
All of the People Can't be Right All of the Time: Providing Excellent Customer Service to Multiple Stakeholders (CS)	Stacey Wade (University of Tennessee, Knoxville) Leerin Shields (Advent Health) and Bonniejean Zitske (University of Wisconsin-Madison)
Promoting Inclusive Workplaces: Perspectives on Creating Diverse and Welcoming Environments in Research Administration (CS)	Patrick Fraser (Georgia Institute of Technology); and Tamara Kuhn Martin (University of Wisconsin-Madison)
Beyond the Red Tape: How to Build Relationships with Faculty (CS)	Kathleen Halley-Octa (Georgia State University) Scott Niles (Georgia Institute of Technology)
Communication Strategies for Internal and External Stakeholders (CS)	Lauren Brown (University of Kentucky) and Melissa Cecil (University of Florida)
Inclusive Practice Through Mindfulness (CS)	Bonniejean Zitske (University of Wisconsin-Madison), Laneika K. Musalini (Tri-County Technical College), and Kaslina Love Mosley (Washington University School of Medicine)

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True Bliss: Finding Happiness in the Workplace (DG)	Kimberly Johns (University of Florida) and David Smelser (University of Tennessee)
Diversity & Inclusion...It is More Than You Think! (DG)	Laneika K. Musalini (Tri-County Technical College), Kaslina Love Mosley (Washington University School of Medicine), Bonniejean Zitske (University of Wisconsin-Madison)
2020 Book Club: The Empowered University	Bonniejean Zitske (University of Wisconsin-Madison) and Tanya Blackwell (Children's Healthcare of Atlanta)

All The People Can't Be Right All the Time: Providing Excellent Customer Services to Multiple Stakeholders
Human Relations - Overview | Concurrent Session

Each institute has similar issues when it comes to dealing with their customer base, whether the customer base is internal or external to the institute. Improving customer service is vital to a research administrator to help lessen the burden on all parties. In this session, we will discuss case studies from our individual institutes that include stories of what has worked for us and what did not work. This session will conclude with a summary of the underlying concepts to improve customer service.

- In this session, participants will be exposed to case studies illustrating what was not working at three different institutes.
- In this session, participants will learn how those three institutes improved their customer service.
- In this session, participants will walk away with some underlying concepts for improving customer service at their institutes.

Stacey Wade, Sponsored Programs Administrator - University of Tennessee, Knoxville
Leerin Shields, Grants and Contracts Manager -Advent Health
Bonniejean Zitske, Assistant Director of Research Financial Services - University of Wisconsin -Madison

Communication Strategies for Internal and External Stakeholders
Human Relations - Basic | Concurrent Session

As Research Administrators, we communicate daily through emails and phone calls, or at meetings and conferences. Understanding the communication needs of both internal and external stakeholders is vital for building partnerships and trust. As compliance officers we often love to reference policies or standard operating procedures, often forgetting that those we work with may not share the same background or organizational mission. Additionally, in such complex organizations that many of us work for, new policies and procedures evolve over time, making it increasingly important to clearly communicate these changes to our internal and external stakeholders. In tandem, good research administrators are constantly building strong relationships with faculty and colleagues, while collaborating across multiple layers of departments, colleges, and organizations. Having such a broad audience often leads to miscommunication. Understanding stakeholder audiences and developing strategies for communication are key components of an RA position and impact success in the field.

It is vital for emails to be clear, concise, and action oriented while encouraging collaboration and flexibility. However, sometimes things must be done the old-fashioned way and a phone call is necessary to get all parties on the same page. While knowledge of policies and understanding an RFA are key components of an RA position, customer service and communication are by far the qualities that can set us apart.

- Identifying your stakeholders and why they matter.
- Different methods of communication and knowing when to use them (email, instant messaging, when to pick up the phone, or even having a face to face meeting)
- Reflective communication strategies from multiple perspectives.
- Learning how to be a better research administrator.

Lauren Brown, Senior Grant Proposal Specialist - University of Kentucky
Melissa Cecil, Grant Specialist - University of Florida

2020 Book Club: The Empowered University
Human Relations - Basic | Discussion Group

Bring your coffee and join us for a thought-provoking discussion on Dr. Freeman Hrambowski's latest book, The Empowered University. This compelling and inspirational work focuses on shared leadership, culture change, and academic success. Dr. Hrambowski is a national leader in promoting diversity in STEM fields. He is the president of University of Maryland Baltimore County, which is the #1 producer of African American undergraduates who go on to complete an M.D./Ph.D. and #2 nationally for African American undergraduates who complete a science or engineering Ph.D. In this book Dr. Hrambowski and his team lay out a step-by-step plan for transforming academic institutions from under-performing examples of mediocrity and sameness to empowered visions of excellence and inclusion. Join to share what you took from the book and how you'll be using it to create change and opportunity at your home institution.

Bonniejan Zitske, Assistant Director of Research Financial Services - University of Wisconsin-Madison
Tanya Blackwell, Manager, Office of Sponsored Programs - Children's Healthcare of Atlanta

Diversity and Inclusion...It is More Than You Think
Human Relations - Basic | Discussion Group

Curious about diversity? Want to know what it really means and how if affects you? Join us in a discussion centered around diversity & inclusion and learn about the many facets of diversity. Many people tend to focus on one or two characteristics of diversity; however, you will quickly learn that diversity goes beyond the surface. This discussion group is a follow-up to the Inclusive Practice Through Mindfulness concurrent session.

Laneika Musalini, Director of Grants Development - Tri-County Technical College
Bonniejan Zitske, Assistant Director of Research Financial Services - University of Wisconsin-Madison
Kaslina Love-Moseley, Senior Research Administrator, Supervisor - Washington University School of Medicine

Beyond the Red Tape: How to Build Relationships with Faculty
Human Relations - Overview | Concurrent Session

Whether you work in a central office or a department, we all have PIs we love… and those who drive us crazy. Most of us do not have the luxury of choosing the PIs we work with, so it is important to build productive relationships with even our most difficult faculty and researchers. This session will discuss tactics for building relationships, having tough conversations with PIs, and reminding faculty them that research administrators are a value add rather than another layer of bureaucracy standing between them and their research.

- Pending

Kathleen Halley-Octa, Director, Office of Research and Sponsored Programs (CEHD) - Georgia State University
Scott Niles, Contracting Officer/Research Associate I - Georgia Institute of Technology

True Bliss: Finding Happiness in the Workplace
Human Relations - Basic | Discussion Group

"Find a job you enjoy doing, and you will never have to work a day in your life." – Mark Twain. As research administrators, it can be difficult to find a work environment that promotes growth, open communication, and general comradery among staff that makes going to work a joy rather than a burden. Happiness at work can be difficult to achieve in the stressful environment of Research Administration, but for those of us that have made this a career, we see the joy and benefit in what we do. In this session, we want to discuss how to direct these open lines of communication with management and other staff members, tips to improve your workplace environment/employee motivation, and open lines of communication with leadership and staff so that no one is above reproach.

Kimberly Johns, Research Administrator - University of Florida
David Smelser, Assistant Director - University of Tennessee

Bridging Relationships Across Generational Lines

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Human Relations - Overview | Concurrent Session

Today's work environment is increasingly diverse. There are more generations working together than ever before, which can be both invigorating and challenging. As research administrators, we rely on each other to work together as a team; whether central office, departmental, or somewhere in between. This interactive session will discuss recommendations for addressing pivotal conversations we all encounter while developing workplace relationships. Come to this session ready to participate!

- Recommendations for building healthy workplace relationships
- Examine various perspectives and work habits of different generations
- Examine the dynamics of challenging workplace conversations

Kay Gilstrap, Assistant Director, Business Operations - Georgia State University
Candice Ferguson, Assistant Director, Research Training - Georgia State University
Kathleen Halley-Octa, Director, Office of Research and Sponsored Projects, College of Education & Human Development - Georgia State University
Shannon Sutton, Director of Sponsored Projects - Western Illinois University

Inclusive Practices Through Mindfulness
Human Relations - Overview | Concurrent Session

Mindfulness can lead toward more intentional behavior and better understanding of ourselves and those around us. Many scientific studies suggest that mindfulness reduces unconscious bias and judgement and leads to more inclusive practice in the workplace.

Participants will be able to:

- Define unconscious bias and begin to identify biased thought patterns.
- Understand the science behind how inherent thought processes are interrupted by mindful practice.
- Learn strategies to use mindfulness to help create inclusive conversations and environments.

Bonniejean Zitske, Assistant Director for Research Financial Services - University of Wisconsin - Madison
Laneika Musalini, Director of Grants - Tri-City Technical College
Kaslina Love Mosley, Senior Research Administrator - Washington University School of Medicine

Promoting Inclusive Workplaces: Perspectives on Creating Diverse and Welcoming Environments in Research Administration
Human Relations - Overview | Concurrent Session

In this session, we would like to lead attendees through a discussion of how to create more open, inclusive, and accommodating office environments in conducting research administration. While there are often a number of sessions/opportunities geared toward promoting inclusion in regards to race and gender, this session aims to provide more in-depth focus on the inclusion of 1) persons with disabilities and 2) persons

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with diverse cultural backgrounds. These two populations are (and will continue to become) a larger segment of the research administration professional community, and we need to ensure that our office environments are inclusive and accommodating of their needs and backgrounds. By having a diverse workforce with varying backgrounds and areas of experience, we can ensure the practices of research administration are well-informed and representative of the communities and researchers that we serve.
• Understand more of the diverse needs of an increasingly diverse workforce. • Learn how to create more welcoming, inclusive workplaces. • Recognize appropriate language when communicating with people with diverse abilities and/or cultural backgrounds.
Patrick Fraser, Grants & Operation Manager, Center for Inclusive Design & Innovation - Georgia Institute of Technology Tamara Kuhn Martin, Assistant Dean for Research Administration, College of Engineering - University of Wisconsin - Madison

Preaward: Sessions related to finding funding, putting proposal teams together, writing proposals, developing budgets, institutional review and approval processes, proposal submission, and post-submission follow-up activities such as resubmission.
Track Leads:
Region III: Ken Carter, University of Tennessee, Knoxville
Region IV: Blair Stauffer, Medical College of Wisconsin

Session Title	**Presenter(s)**
Best Practices for Limited Submissions (DG)	Sue Grimes (Purdue University) and Beth Hodges (Florida State University)
Subawards: A Collaboration between the Department and Central Office (CS)	Caroline Miller Robinson, Suzanne E. Alstadt, and Andrea Ham (University of Arkansas for Medical Sciences)
Communications Tools for Pre-Award Research Administrators	Heather Johnston (Miami University)
Supporting Faculty in Proposal Development and Collaboration: Perspectives from the School and Central-Levels (CS)	Tony Ventimiglia (Auburn University) and Heather Offhaus (University of Michigan Medical School)
Post-award Clauses for Pre-award Negotiators (CS)	Chase Bunger (University of Missouri) and Becky Black (Missouri University of Science and Technology)
Managing Grant Opportunities (CS)	Michelle Schoenecker (University of Wisconsin-Milwaukee)
Oh No, Not Another Budgeting Session: But Seriously, What Did I Forget? (CS)	Betty Morgan (Duke University)

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OH No, Not Another Budgeting Session: But Seriously, What Did I Forget?
Pre-Award - Basic Concurrent Session

We will discuss the basics of getting to know your PIs science to enhance your ability to prepare a proposal budget, as well as manage it from the post award perspective. This includes identifying the needs of the PI's research, the institution, and the pre and post award central offices.

- 1. How to get to know your PI's science so you can pull a budget together.
- 2. Identify the needs of the PI, the institution, pre and post award offices.
- 3. Match the budget to the science.
- 4. Can you manage what was proposed at pre-award from the post-award perspective?
- 5. If the PI has this in the budget, then include this. Learn the "if this, then" scenarios.

Betty Morgan, Grants and Contracts Manager -Duke University
Lorrie Robbins, Research Administration Manager - The University of North Carolina at Chapel Hill

Communications Tools for Pre-Award Research Administrators
Pre-Award - Basic Concurrent Session

This session introduces free and low-cost online tools research administrators can use in the pre-award office to enhance the effectiveness and efficiency of communications with RA colleagues, researchers, and the university community. The presenter will suggest pre-award-specific uses for tools ranging from screen casting to asynchronous collaboration to blogging. She will also walk participants through some of the key features of various applications.

After attending this session, participants will be able to:

- List several free or low-cost online tools that facilitate communication
- Identify key features of these tools
- Describe how these tools can be applied to communications in the pre-award office

Heather Johnston, Associate Director of Research Communications - Miami University

Managing Grant Opportunities
Pre-Award - Basic Concurrent Session

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Today there are many ways for pre-award research grant administrators to find grant opportunities and disseminating them to specific faculty members. But what are the best options for grant offices that serve only one small department, or serve an entire college or university? Do we need to know each faculty member's research in order to find the right opportunities? How do we distribute grant opportunities that faculty will read? And how can we track deadlines and streamline reminder processes without wasting valuable time? The proposed concurrent session goes beyond identifying and learning how to use the most popular grant search engines and software tools. By focusing on the best practices of grant searching and dissemination, research administrators will learn effective ways to reduce the amount of time they spend searching and to streamline research tasks.

Participants will be able to

- determine the types of searching and dissemination strategies that work best for their institution
- better understand the importance of tracking deadlines to organize future grant searches
- implement specific strategies to save time, increase efficiency, and reduce frustration.

Michelle Schoenecker, Senior Proposal Development Manager - University of Wisconsin-Milwaukee

Post-Award Clauses for Pre-Award Negotiators
Pre-Award - Basic — Concurrent Session

This session is geared toward the pre-award negotiator who wants to learn more about how contract language can affect the post-award team. Our post-award presenter will discuss contract language that makes her job more difficult, why that is the case and how she works around it, while our pre-award presenter will show some alternative language (and how we can justify that language) that can hopefully make the post-award team's job easier.

By the end of the presentation, the pre-award administrator will know better strategies for negotiating clauses that affect post-award. We will discuss:

- - Billing
- - Timesheets
- - Receipts/Expense Tracking Forms
- - Financial Reports.

Chase Bunger, Senior Compliance Manager - University of Missouri
Becky Black, Grant and Contracts Administrator - Missouri University of Science and Technology

Subawards - A Collaboration between the Department and Central Office
Pre-Award - Intermediate — Concurrent Session

A subaward is an excellent mechanism to solidify a collaborative partnership between two institutions. The subaward management process provides a great opportunity for collaboration between department administration and sponsored programs. This session will present an overview of the subaward process starting with the pre-award and through the post-award phases, providing real world examples of how departments and central offices can work together to streamline work and share responsibilities. Focusing primarily on NIH-funded subawards, we will outline the responsibilities of departments and sponsored programs, and discuss the use of Federal Demonstration Partnership (FDP) forms as well as other tools for making the process efficient and effective.

- Learning Objectives:
- • Pre-Award Subaward Process
- Central Office responsibilities
- Department/PI responsibilities
- Forms/Information needed for the initial application
- • Post-award monitoring of subaward activity
- Central Office responsibilities
- Department/PI responsibilities
- FDP Forms
- • Best practices for department and central office collaboration

Caroline Miller Robinson, Finance Manager - University of Arkansas for Medical Sciences
Andra Ham, Senior Grants Administrator - University of Arkansas for Medical Sciences
Suzanne Alstadt, Director of Sponsored Research Programs Administration - University of Arkansas for Medical Sciences

Supporting Faculty in Proposal Development and Collaboration: Perspectives from the School and Central-Levels

Pre-Award - Basic — Concurrent Session

As research administrators, we approach faculty support from different levels (departmental, college/school, central office). However, the overall goal is to ensure that our faculty are successful in their proposal development endeavors. This support is not limited to reviewing an RFP or pulling together forms and budgets. The process can start months before a funding source is identified and may involve collaboration between two people or a team of individuals. In addition, the support and resources available can vary between institutions as well as within the various levels of an institution (department, college, and central-level). This session will explore some of the resources that have been developed and are being utilized at each of these levels at two different institutions.

- Participants will learn about resources that have been developed to support faculty in developing collaborations.
- Participants will learn about proposal development activities that may be replicated at their own institutions.

Tony Ventimiglia, Acting Executive Director of Research Administration Services - Auburn University
Heather Offhaus, Director of Grants Services and Analysis - University of Michigan Medical School

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Best Practices for Limited Submissions Pre-Award - Basic Discussion Group
When a sponsor limits the number of proposals that can be submitted to a funding opportunity, institutions must have a process for determining how to advance the proposal(s) they deem to be most likely to succeed. This discussion will focus on various aspects of limited submission management including: tools for identifying and advertising funding opportunities; coordinating the review process; and communicating results. Session leaders will provide ideas for limited submission best practices based on their own experiences and invite participants to share their own processes and experiences.
Sue Grimes, Assistant Director, Research Development - Purdue University Beth Hodges, Director, Research Development - Florida State University

Postaward: Sessions related to award setup, financial management, rebudgeting, expenditure review, subrecipient monitoring, financial reporting, audit, cost sharing, closeout, etc.
Track Leads:
Region III: Rashonda Harris, Emory University
Region IV: Dorothy Johnson, University of Wisconsin-Madison

Session Title	**Presenter(s)**
It's Time For Invoicing Feud (CS)	Lakeisha Munnerlyn (Emory University)and Erika Clark (University of Louisiana at Lafayette)
From the NOA to Closeout, Best Practices for Post Award Management (CS)	Xiaowen Ma (Emory University) and Nicole Nichols (Washington University in St. Louis)
Connecting the Dots: Post-Award Metrics in Performance Reviews (CS)	Brian Miller (Emory University) and Janice Grace (Mayo Clinic)
Best Practices for Electronic Portal Submissions (CS)	Brian Miller (Emory University) and Mandi Kilcoyne (University of Wisconsin-Madison)
Consistency in Award Management during a Change in Financial Systems (CS)	Lauren Swindell (Georgia Institute of Technology) and Dorothy Johnson (University of Wisconsin-Madison)
Month-end, Year-end, Getting to the Finish line ON-TIME! (DG)	Mary Bauer (University of Wisconsin-Madison) and Angela Garvin (Emory University)
A Collaborative Effort: Talking to Various Stakeholders about Effort (CS)	Lacey Rhea (University of Florida) and Jeff Nytes (University of Wisconsin-Madison)

Navigating the Gray: Allowability is Not Always Black and White (DG)	Chelsea Gambill (Arkansas State University) and Whitney Lumpkin (Arkansas State University) and Sandy Fowler (University of Wisconsin-Madison)
The Importance of Costing Correctly: Expense Coding Matters (DG)	Xiaowen Ma, Emory University and Angie Johnson (University of Wisconsin-Madison)

From the NOA to Closeout, Best Practices for Post Award Management
Post-Award - Overview Concurrent Session

Collaboration is the name of the game in Research Administration and collaborators are joining forces within institutions to put together the best practices for post award management. This may require more responsible for the already busy Research Administrators to manage but will yield an efficient outcome.

This session will cover tips, tricks and best practices for working in a cradle to grave format regardless if you are in a department or a central office. This session will address strategies that can be implemented at all levels to maximize efficiency and ensure all bases are covered when it comes to post award management. These strategies will address the lifecycle of the project, from notice of award to closeout.

- Attendees will gain insight on how collaboration in a Post Award workflow format can be a purposeful relationship in which all parties strategically choose to cooperate in order to achieve shared or overlapping objectives.

Xiaowen Ma, Financial Manager - Emory University
Nicole NIchols, - Washington University in St. Louis

Consistency in Award Management During A Change in Financial Systems
Post-Award - Intermediate Concurrent Session

Implementing a new financial system such as Workday requires institutions to change business practices and develop new processes and procedures. This session will explore techniques for maintaining consistency in award management during the change from one financial system to another. We will look at documentation challenges, how to adapt to changes in reporting capabilities, how shifting role responsibilities on campus impact the research administrator's responsibilities, and how departmental and central office administrators can work together to overcome these challenges.

- Participants will learn techniques for applying policies consistently when the methodology has changed.
- Participants will explore methods for documenting action taken on awards when reporting capabilities have changed.
- Participants will learn strategies for adapting to changes in system capabilities and role responsibilities.

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• Participants will identify ways for departmental and central office administrators to work together to ensure successful award management during times of change.
Lauren Swindell, Financial Manager - Georgia Institute of Technology - School of Mechanical Engineering Dorothy Johnson, Managing Officer - University of Wisconsin - Madison

It's Time for Invoicing Feud Post-Award - Basic   Concurrent Session
This session will enlighten attendees on the many formats, billing requirements, and sponsored portals for invoice submissions by way of Family Feud affectionately renamed, Invoicing Feud!! This session will place the attendees into two groups. Each group will be required to answer invoice related questions correctly to advance to the final round where they will receive a winner's certificate.
• Attendees will gain insight on the many types of invoice formats, sponsored requirements and best practices for invoicing.
LaKeisha Munnerlyn, Senior Financial Analyst - Emory University Erika Clark, Pre-Award Grants Specialist - University of Louisiana at Lafayette

Best Practices for Electronic Portal Submissions Post-Award - Intermediate   Concurrent Session
Are you overwhelmed with electronic portal submissions? Are you going mad with the number rejections, resubmissions and misapplied payments? Well this is the session for you. Covered will be electronic submission for various sponsors such as WAWF/iRAPT, G5, ASAP, NSA, and more. We'll help you (try) to avoid rejection!
• Attendees will gain insight on how to leverage their financial systems along with documenting a streamlined process for electronic portal submissions.
Brian Miller, Financial Manager - Emory University Mandi Kilcoyne, Grant Accountant - University of Wisconsin-Madison

Connecting the Dots: Post-Award Metrics in Performance Reviews Post-Award - Intermediate   Concurrent Session
How can we really measure employee performance in the post-award world AND use metrics? When is it time to meet with an employee about his or her performance? Is the employee aware of their performance? Often staff find out they were not meeting expectations when it's too late. The session will

cover ways to relay feedback in real time to allow turnaround for the employee and ROI for the manager.

This session will dive into the metrics that matter in the post-award world of workload management by connecting metrics to performance. Are we getting our job done in a way that we are achieving and maximizing? Does post-award staff feel their workload is manageable?

- Participants will be able to identify the metrics that are critical to measuring the efficiency of workload management and metrics in a post-award office. Participants will be able to formulate strategic plans that address areas of concern.

Brian Miller, Financial Manager - Emory University
Janice Grace, Director, Office of Sponsored Projects, Mayo Clinic

The Importance of Costing Correctly: Expense Coding Matters
Post-Award - Intermediate — Discussion Group

For budgeting and accounting purposes, it's crucial not only to document your business expenses but to classify them properly. Department Research Administrators and Business Managers are tasked with the responsibility of directly applying charges to grant accounts. The distinction between "direct" and "indirect" costs may appear intuitive and self-explanatory. In addition, Cost Principles of Allowability, Allocability, Reasonableness, & Consistency should conform to sponsor, university, and ultimately Federal Uniform Guidance guidelines. All of these factors contribute to accurate and consistent reporting of sponsored expenditures for sponsors & financial statements, as well as for compliance during internal, external, & Single Audits. This interactive presentation will provide an overview of the importance of ensuring costs charged to sponsored awards are properly coded in the financial system. We will discuss scenarios providing the “why” of the importance. We will also discuss scenarios of improper costing and the downstream effects it may cause. We encourage attendees to bring real examples and/or questions from their respective institutions for discussion as well.

- Define differences between Direct and Indirect Costs
- Gain understanding of the Cost Principles of Allowability, Allocability, Reasonableness, & Consistency
- Discuss accurate coding charges to sponsored awards and the effects on compliance, reporting, and audit

Xiaowen Ma, Financial Manager - Emory University
Angie Johnson, Financial Program Manager - University of Wisconsin - Madison

Month-End, Year-End, Getting to the Finish Line ON TIME!
Post-Award - Basic — Discussion Group

Some have survived, and some have flatlined during the stressful time called year end which happens to align many times with month end. Who’s idea what this?! This session will explore ways you can make it to the finish line with some of your sanity. Covered will be Invoicing, Financial Reporting, Closeout, Turnaround time(s) oh and did I mention Customer Services?! How to combine this beautiful series of events that happens annual with accuracy and timeliness. Attendees will gain insight on how to develop, use and strategize best practices for effectiveness during month end and year end.

Angela Garvin, Senior Financial Research Analyst - Emory University
Mary Bauer, Senior Post Award Administrator - University of Wisconsin - Madison

Navigating the Gray: Allowability is Not Always Black and White
Post-Award - Basic — Discussion Group

We make decisions about what can and cannot be charged to sponsored projects every day. Have you ever encountered an expense you weren't quite sure about? Bring some of those questioned costs and discuss how to arrive at the best decision for your institution.

Chelsea Gambill, Sponsored Programs Officer, Sponsored Programs Accounting - Arkansas State University
Whitney Lumpkin, Director, Sponsored Programs - Arkansas State University
Sandra Fowler, Assistant Dean, College of Agricultural and Life Sciences - University of Wisconsin-Madison

A Collaborative Effort: Talking to Various Stakeholders About Effort
Post-Award - Intermediate — Concurrent Session

A concurrent session designed to prepare research administrators for various conversations they may encounter when discussing effort reporting, including a practical exercise to walk faculty through at the time of certification.

- Identify the various stakeholders for effort reporting
- Guide faculty through effort calculations
- Respond constructively to common questions and complaints from faculty

Lacey Rhea, Grant Specialist - University of Florida
Jeff Nytes, Managing Officer, Research and Sponsored Programs - University of Wisconsin-Madison

Predominantly Undergraduate Institutions (PUI): Sessions of interest to research administrators who work at institutions that are generally more focused on teaching than research, serve a mostly undergraduate student body, and/or are relatively new to applying for external funding and managing sponsored research projects.
Track Leads:

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Region III: Alison Krauss, Western Carolina University
Region IV: Carl Fox, University of Wisconsin-Whitewater

Session Title	**Presenter(s)**
I'm Only Here for the Snacks: Establishing an Office of Research at a PUI (CS)	Linnea Minnema (Samford University)
Making the necessary research administration Infrastructure accessible at a PUI (CS)	Regina Matheson (St. Ambrose University), Kristin Beck (Northern Michigan University), Katrina Brandli (University of Arkansas at Fort Smith)
Ready, Set, Research! Designing and Implementing a tiered training program for faculty at a PUI through collaborations. (CS)	Glenn Pfeifer (Georgia State University-Perimeter College), Leonard Conner (Georgia State University - Perimeter College) and Mary Elizabeth Tyler Boucebci (Georgia State University-Perimeter College)
Best Practices for Working with Difficult PIs at a PUI (DG)	Pam Whitlock (UNC Wilmington)
Research Development at a PUI: Doing More With Less (DG)	Alison Krauss (Western Carolina University),
The NCURA Research Program: "Started from the Bottom Now I'm Here"; Going from RA to PI (CS)	Katy Hendry (University of West Florida)

Making the necessary research administration Infrastructure accessible at a PUI
PUI - Overview — Concurrent Session

In the spirit of the theme for this collaborative regional meeting, individuals from three institutions representing both regions will discuss experiences building infrastructure and capacity at their home institutions. This session will cover the infrastructure footpath at 3 different PUI's to insure compliance and manage risk. The topics covered in this session will include what an export control program might look like at a PUI, convincing top leaders what infrastructure is necessary regardless if they are a PUI, working with faculty who have or need a scholarship agenda, and how the IRB and IACUC fit in with an institutional grants office.

- Identify relevant policies and procedures that exist or need improvement at their institution.
- Determine the appropriate offices/personnel on their campuses to engage about specific policies and procedures.
- Identify and develop new policies and/or procedures as relevant to their institutional needs.
- Determine how a PUI Grant/Sponsored Program Office can support faculty with a scholarship/research agenda.

Regina Matheson, Assoc. VP Academic Grants and Sponsored Programs - St. Ambrose University

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Kristin Beck, Assistant Director - Grant Development/Training Coordinator - Northern Michigan University
Katrina Brandli, Grants Compliance Officer - University of Arkansas Fort Smith

Ready, Set, Research! Designing and Implementing a tiered training program for faculty at a PUI through collaborations.
PUI - Intermediate — Concurrent Session

In this session participants will explore how to create and deploy a training program designed to prepare faculty at a PUI to pursue external funding for projects that meet their interests. An interactive discussion will enable participants to share their success and challenges when it comes to faculty training.

- Participants will explore strategies to offer faculty training on research.
- Participants will be taught a faculty training model and curriculum that can be adapted and implemented at other PUIs.

Glenn Pfeifer, Director, Grants Development and Administration- Georgia State University - Perimeter College
Leonard Connoer, Post Award Administrator - Georgia State University - Perimeter College
Mary Elizabeth Tyler Boucebci - Pre Award Administrator - Georgia State University - Perimeter College

NCURA Research Program: "Started from the Bottom Now I'm Here"; Going from RA to PI
PUI - Intermediate — Concurrent Session

In this two-part session, we will discuss the NCURA Research Program as well as the findings from my proposal titled, "Increasing the Odds of the Return on University Investments into Faculty Research: Skills versus Money".

Part I: What is the NCURA Research Program and how did I apply for this external funding? What was it like being a PI? Would you do it again? All of these questions and more will be answered in this session. The NCURA Research Program provided a once in a lifetime experience to take off my RA hat and put on the PI hat.

Part II: Providing incentives to faculty to do externally funded research is difficult at a Predominately Undergraduate Institution (PUI). Research Administrators are constantly faced with the challenge of finding effective methods for increasing research output (external funding) but are often given little resources in order face that challenge head-on. One such method that is used is by institutions of all sizes is by providing faculty with cash-incentives and/or internal grants. In the second part of this concurrent session, we explore the “Problem”, the “Purpose”, and the “Polestar” of this universal problem and discus how the NCURA Research Program provided external funding in the pursuit of finding a solution.

The Problem: UWF is a predominately undergraduate serving institution with a 3:3 teaching-load and is recognized as a teaching institution versus research-intensive institution. The University wants to shift from being strictly focused on teaching and become more balanced with equal weight on research and research (grant expenditure) output.

The Purpose: This project was designed to analyze and design the best method for increasing external funding at a small institute or PUI-university.

The Polestar: Increase faculty output in external grant submissions by identifying appropriate internal grant mechanism(s) to both motivate faculty scholarship desires and provide funding support for their projects that yield the highest return on the University’s investments from external funding agencies.

- learn more about the NCURA Research Program
- understand the process and roles of being an RA and PI
- learn more about the internal grants (IG) program at UWF and how the NCURA Research Grant provided support so the IG program could be more closely evaluated.

Katy Hendry, Assistant Director, Sponsored Grants and Contracts - Florida Institue for Human and Machine Cognition

Organizational Development: This track focuses on techniques and tools to improve business processes and logistics including personnel recruitment, using eRA and Cloud solutions to improve processes, managing organizational communications and change, supporting faculty through new organizational models, and more.
Track Leads:
Region III: Candice Ferguson, Georgia State University
Region IV: Fouza Yusuf, Medical College of Wisconsin

Session Title	**Presenter(s)**
Professional Development Opportunities in Research Administration (CS)	Jennifer Foley and Crystal James (Medical College of Wisconsin)
Extreme Makeover: Electronic Research Administration System Edition (CS)	Elise Dantuma (University of Central Florida)

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Recruitment-Avenues for Entry into Research Administration (CS)	Kathy Butts Arnold (Emory University)
Plotting A Path: Exploring Your Options in the Field of Research Administration (CS)	Kristin Harmon (University of Wisconsin-Madison)
Launching a Cluster Program: UCF Case Study (CS)	Tamara Gabrus (University of Central Florida)
A Portal Into the Unknown: Developing an information hub for your institution (CS)	Lacey Rhea, Edy Zettler, Robin Barber (University of Florida)
Engaging Faculty for Mission Success (DG)	Robert Holm (Auburn University)
Research As Seen on TV (DG)	Susan Fredson-Cole (The Ohio State University) and Melanie Clark (Georgia Institute of Technology)
Creating Order Within Chaos By Embracing Change (DG)	Kristin Harmon (University of Wisconsin-Madison)

Engaging Faculty for Mission Success
Organizational Development - Intermediate — Discussion Group

It will be an open discussion surrounding-

- HOW TO acquire faculty needs regarding an understanding of research administration.
- HOW TO approach faculty "training".
- HOW TO engage faculty in supporting RA training.
- HOW do you measure success when talking about faculty engagement?

We are seeking experts from the audience to help us and others understand:

- How you successfully surveyed faculty to provide you with their needs and interests in research administration
- The tools you developed and used to respond to faculty needs (e.g. videos, bring the information to the faculty) and faculty engagement surrounding
- Faculty training
- Faculty support of RA training
- Faculty providing dialogue to develop training that directly affects pursuing RA training programs.
- How you have engaged faculty to participate in future dialogues surrounding the aspects of research administration that have or may have a direct effect on the successful pursuit of their research program(s) at your institution.

Robert Holm, Associate Director - Auburn University
Robinlee Speakmon, Training Coordinator II, GRANT certificate Program Manager - University of South Carolina

Recruitment - Avenues for Entry into Research Administration

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Organizational Development -Overview | Concurrent Session

No one aspires to research administration as a career. Every research administrator you meet will have a unique, and often entertaining story. Take yourself, for example. We're willing to wager that you didn't find the profession of research administration, but research administration found you!

In our presentation, we're going to peek into our history with a worthwhile stop into the present before we press on to the future to identify where we will find future research administrators, and the roles we can play now to recruit them for this little known, yet incredibly fulfilling profession.

Attendees will review and evaluate:

- History of research administration as a profession
- Demographics and interests of current research administrators
- Intentionally look into who will be the research administrators of the future and how we can find them in our home states and regions.

Kathy Butts-Arnold, Research Administrator, Post-Award III- Emory University
Erin Butler, Research Administrator, Pre-Award II - Emory University

Launching a Cluster Program: UCF Case Study
Organizational Development - Overview | Concurrent Session

Sponsors have always sought to fund research that is new and novel; but NOW they're seeking interdisciplinary research that breaks down the silos of the academic units to create an integrated platform focused on society's biggest issues ALL IN ONE.

Join this session to see how the University of Central Florida is tackling this need while we guide you through our lessons learned, in progress and plans for the future with our Faculty Cluster Initiative.

- Starting from scratch, what do you need to consider when establishing a cluster program
- Obtaining institutional buy-in
- Creating an environment that fosters collaboration
- Identifying long term goals & demonstrating impact

Tamar Gabrus, Program Director, Faculty Cluster Initiative - University of Central Florida
Ginny Pellam, Associate Director, College of Engineering - University of Central Florida

Professional Development Opportunities in Research Administration
Organizational Development - Overview | Concurrent Session

This session is for those new and interested in professional development opportunities in research administration. The majority of us work in or with higher education and it would follow that just like students who receive training to perform for and build their career, we, too, benefit from regular training and development opportunities to learn about the ever-changing research administration landscape. Research administration is a broad topic and for those who specialize or for those who are generalists. We need to be aware of legislative changes, institutional changes, enhance our leadership skills, and network in order to keep not only ourselves competitive, but also keep our institutions competitive. Through professional development, we can be sure we have the knowledge, skills and abilities to excel and find personal satisfaction and wellness.

- Define the purpose of professional development
- Briefly provide an overview of research administration
- Identify areas of professional development
- Identify types of professional development
- List and discuss professional development resources

Jennifer Foley, Department Administrator - The Medical College of Wisconsin
Crystal James, Business Operations Coordinator - The Medical College of Wisconsin

Extreme Makeover: Electronic Research Administration System Edition
Organizational Development - Intermediate Concurrent Session

Electronic systems have become an integral part of research administration. Everything from proposal submissions to closeout and technology reporting can operate via electronic systems. So what happens when your university performs a complete overhaul of those electronic systems? This session will take a look into the preparation and implementation of a new electronic systems for managing research administration, HR and finance from the college/department/unit perspective. Presenters will also discuss lessons learned.

- Participants will be able to give examples of the types of discussions that should occur between central, college/department/unit, finance, HR, and other units impacted by the change in systems.
- Participants will be able to assess how changes to an electronic system will impact the college/department/unit from a business process perspective.
- Presenters will identify lessons learned.

Elise Dantuma, Manager, Contracts and Grants - University of Central Florida
Tamar Gabrus, Program Director II,- University of Central Florida
Ginny Pellam, Associate Director, Sponsored Programs - University of Central Florida

Research As Seen on TV
Organizational Development - Overview Discussion Group

TV and movies as usually inspired by real life examples. In this discussion group we will review how Hollywood portrays research. We will dive into a few clips to filter out fact from fiction, while applying the federal regulation to each scenario. This session is open to everyone, newbies in the field and seasoned professionals.

Susan Fredson-Cole, Sponsored Programs Office - The Ohio State University

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Melanie Clark, Associate Director - Georgia Institute of Technology

Creating Order Within Chaos By Embracing Process Change Organizational Development - Overview Discussion Group
Change is difficult; it is also inevitable. In research administration, changes are often in response to external factors that we have little to no control over, requiring us to act quickly and accurately with limited resources and support. Action is essential to maintain compliance, meet deadlines, and protect our research programs and institutions. Changes need to be integrated into nebulous, fluid processes and procedures, often necessitating new policies, disseminating the information to the relevant stakeholders across the organization, and gaining the buy-in of those we work with and support. Join your colleagues to discuss what makes for successful process improvement implementation. The panel will provide insights into the change management process, how to identify and invite the right stakeholders to the table, and talk about what has worked – and not worked – for us in rolling out change at our institutions.
Kristin Harmon, Intellectual Property Disclosure Specialist - University of Wisconsin -Madison Tammy Jobes, Sponsored Projects Administrator - Gillette Children's Speciality Healthcare

Plotting a Path: Exploring Your Options in the Field of Research Administration Organizational Development - Intermediate Concurrent Session
Research administration is a diverse field with many opportunities for professional growth, development, and change. Many offices are structured vertically, with few opportunities to move straight up (especially without your boss leaving/retiring), but there are myriad options for moving laterally and adding to your skill set. From departmental to central administration, pre-award to post-award administration, or related positions with technology transfer, intellectual property, education/training, or compliance, an open mind can broaden both your view and your skill set. The session will cover the range of opportunities within research administration, how to assess yourself and your skills to determine what types of positions are right for you, and how to navigate changes in focus area.
● Explore the range of professional opportunities within research administration ● Learn to evaluate which types of positions fit your skill set and how you can relate existing skills to new areas ● Discuss techniques for transitioning between focus areas and attaining new skills as needed
Kristin Harmon, Intellectual Property Disclosure Specialist - University of Wisconsin -Madison Linnea Minnema, Director of Grants and Sponsored Programs - Samford University

A Portal into the Unknown: Developing an Information hub for your institution

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Organizational Development - Advanced	Concurrent Session
In this panel-style session, presenters will showcase the activities and outcomes of an institutional committee tasked with creating a comprehensive communications plan and online information portal for research administration.	
After this session, attendees will be able to: ● Assess the viability of a similar task force within their own institution. ● Identify the knowledge/communication gaps within their own institution. ● Determine the appropriate institutional content matter experts for consultation on solutions. ● Relate presenter successes and failures to their own initiatives.	
Lacey Rhea, Research Administration Manager - University of Florida Robin Barber, Research Administrator II - University of Florida	

Senior: Sessions of interest to very experienced research administrators, including topics such as succession planning, retirement considerations, giving back to the profession, and options for remaining active in the field post-retirement.
Track Leads:
Region III: Jill Tincher, University of Georgia

Session Title	Presenter(s)
Charting a Career Path to Senior Leadership in Research Administration (DG)	Suzanne Rivera (Case Western Reserve) and Tony Ventimiglia (Auburn University)
But What About Managing Sponsored Programs? Behind the Scenes of Those Big University Merger and Divestiture Announcements	Robert Andresen (University of Wisconsin-Madison)
See Me! Recognizing and Assigning Credit in a Collaborative World	Heather Offhaus (University of Michigan Medical School) and Barbara Cole (University of Miami)
Team Building as a Method of Succession Planning	Pam Whitlock (Emeritus, University of North Carolina at Wilmington)
The U Turn: Beyond the PI Transfer	Faith Goenner (University of Minnesota), Tyra Darville-Layne (Northwestern University) and Sandra Fowler (University of Wisconsin-Madison)
Research Compliance & Research Administrators: Friends or Frenemies; Working together to develop key strategies for increased Research Capacity	Carpantato (Tanta) Myles (The University of Alabama)

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Improving Workplace Morale	Rashonda Harris (Emory University)

But What about Managing Sponsored Programs? Behind the Scenes of Those Big University Merger and Divestiture Announcements
Senior -Advanced — Concurrent Session

In the increasingly challenging higher education environment, many universities are making big changes to their overall organization. Whether it is a merger with another university or a spin-off, these large reorganizations have a large impact on research administration. This session will examine the challenges, risks, and opportunities created by these large organizational shifts. Learn strategies for coordinating the legal, regulatory, and university requirements as well as managing change, expectations, and human resources.

- Recognize legal, accounting, and operational challenges for sponsored programs during University reorganizations.
- Consider options for managing change and expectations for staff impacted by the reorganizations.

Robert Andresen, Director, Research Financial Services - University of Wisconsin - Madison

See Me! Recognizing and Assigning Credit in a Collaborative World
Senior - Advanced — Concurrent Session

Interdisciplinary research is sought after by sponsors and valued in moving to transformative solutions. But recognizing large team or multi PI Awards may be difficult in existing systems and "claims" from faculty. Join us to explore how institutions are rewarding collaboration and assigning credit for those involved in projects. We'll consider possible evaluative models, distribution of recognition among traditional departments and faculty affiliations within centers, and whether there is a financial return in recognition of research.

- Identify benefits, issues, and challenges with assigning "credit" for interdisciplinary research
- Identify potential, non-traditional ways to assess
- Identify potential recognition mechanisms employed at other institutionse

Heather Offhaus, Director, Grant Services & Analysis - University of Michigan
Barbara Cole, Associate Vice President for Research Administration - University of Miami

Team Building as a Method of Succession Planning
Senior - Advanced — Concurrent Session

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In today's mobile world of employment and the growing retirement of senior research administrators, it has become critical to look to the future and ensure continuation of necessary activities when Sponsored Programs loses an employee. Smaller units are especially hit hard since many offices are already lean in depth and number of personnel. This interactive session will provide ideas and strategies that are helpful to ensuring services and oversight continue when vacancies of any level of staff occur. Come share your experiences and ideas of building a team environment within and beyond the OSP to ensure your institution can continue necessary activities to protect and support research.
● Attendees will gain insight into activities to build redundancy of roles and responsibilities ● Attendees will learn cross departmental resources ● Attendees will gain an understanding of the importance of succession planning for the overall office
Pam Whitlock, Director (Emeriti), Office of Sponsored Program - University of North Carolina at Wilmington, Independent consultant

The U Turn: Beyond the PI Transfers Senior - Advanced Concurrent Session
More often are scenarios arising where institutions aren't relinquishing awards for faculty who are transferring to a new institution. Other scenarios arise whereas awards are relinquished to the new institution, and a portion of the work remains at the original institution. These scenarios present unique opportunities for creative problem-solving regarding award and subcontracts management whereas human resources and institutional policy and procedure may be more restrictive or inflexible. Some institutions have allowed the faculty to serve as PI at both the original and new institution. How would your institution handle this and what are the institutional considerations? How can you be prepared when these scenarios arise at your institution? How can your role both at the department and central administration be established to accommodate scenarios that go beyond the PI transfer?
● Participants will learn institutional rights as they relate to PI transfers and award relinquishment. ● Participants will be provided a best practice for coordinating internal and external stakeholders. ● Participants will learn the roles and responsibilities for the department and central sponsored projects office. ● Participants will be provided case studies of complicated grants management related to the transfer and learn how to problem-solve them.
Faith Goenner, Administrative & Finance Director - University of Minnesota Tyra Darville-Layne, Associate Director for Subcontracts Management - Northwestern University Sandra Fowler, Assistant Dean of Business Services - University of Wisconsin - Madison

Charting a Career Path to Senior Leadership in Research Administration

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Senior - Advanced | Concurrent Session

In this session, the presenters will describe various paths to senior leadership in research administration and explain the different steps research administrators can take to develop leadership skills and ascend the leadership ladder in our profession.

Suzanne Rivera, Vice President for Research and Tech Management - Case Western Reserve University
Tony Ventimiglia, Acting Executive Director of Research - Auburn University

Research Compliance & Research Administrators: Friends or Frenemies; Working together to develop key strategies for increased Research Capacity

Senior - Advanced | Concurrent Session

Activities associated with a compliance program begin before proposal submission and involves different types of research administrators, including compliance staff and pre-award. The most challenging areas of research compliance to maneuver include Human Subjects (IRB), Animal Subjects (IACUC), Financial Conflict of Interest (FCOI), Misconduct in Research, Responsible Conduct of Research (RCR) and Export Control. Establishing best practices, fostering collaborative relationships, and having a process to identify compliance issues is essential in avoiding delays proposal submission, delays in research activities, and preventing incidents of noncompliance. This concurrent interactive session will focus on the role of research compliance and pre-award administrators in establishing better relationships, collaboration, and best practices to help maintain a successful university research compliance program. The discussion facilitators will provide examples of process improvements utilized at one institution with a diverse portfolio of research to improve communication and standard procedures for pre-award and research compliance. There will also be an opportunity to share other examples of working with the “other” research administrators.

Carpantato (Tanto) Myles, Director - University of Alabama
Jennifer Mills, Sr. Grant Specialist - University of Alabama

Improving Workplace Morale

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Senior - Intermediate	Concurrent Session
Do you think you are tuned into your workplace? Have you seen a display these subtle and not-so-subtle symptoms in your employees: eye rolls, high turnover rates, fewer employee conversations, decreased collaboration, and diluted performances. If so, your office may be exhibiting signs of low morale. The best approach to tackling low morale is to embrace positive changes before it takes hold, offsetting boredom and frustration with meaningful benefits, individual acknowledgements, and opportunities to grow.	
Attendees will gain insight on how to implement new and effective ideas how they can Improve Morale in their office. There are many simple, yet powerful, techniques that can be used to instantly boost employee morale. No matter how low your office morale is, these techniques are guaranteed to spark positive change.	
Rashonda Harris, Director of Post Award - Emory University	

SESSION TYPES:

Concurrent Sessions: Concurrent sessions are 60- to 75-minute formal presentations. These sessions are usually lecture-style and have accompanying slides, but they may be more interactive. Case studies and other structured creative activities are welcome. There is usually some question and answer time built in at the end. Proposals for concurrent sessions must include two or three specific learning objectives.

Discussion Groups: Discussion groups are small group, facilitated conversations. Discussions are 60- to 75-minutes long and should usually have no more than two facilitators. Discussion group leaders promote active participation by suggesting a direction, posing questions, keeping the discussion on topic, helping participants make connections, etc. Specific learning objectives are not required.

Concept Posters: Posters focus on innovative ideas, tools, or practices in research administration. Concepts are presented visually on a 36"poster display. Accepted posters will be displayed throughout the meeting, with a designated time for presenters to accompany posters and speak about their innovation.
Concept Poster Leads:
Region III: Stacy Bass, Georgia Institute of Technology
Region IV: John Maurer, Ann & Robert H. Lurie Children's Hospital of Chicago

Workshops: These are deep-dive presentations, traditionally supported with slides and handouts. They are taught by subject matter experts in a classroom-style setting. Presenters may propose either a half-day (3 contact hours) or a full-day (6 contact hours) workshop, depending upon the subject matter to be covered. Workshops require three or more learning objectives.
Workshop Leads:
Region III: Scott Niles, Georgia Institute of Technology

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Region IV: Kathy Durben, Marquette University

Breakfast Round Tables: Informal, give-and-take roundtable discussions that provide a comfortable and casual context to ask questions and gain new information about trends, current issues or specific challenges. Moderated by a table discussion leader, each table addresses a different topic.

SESSION LEVELS:

Basic sessions assume some level of fundamental knowledge of research administration. Participants have limited experience in the subject area. They may be completely new to research administration, or they may be looking to grow their knowledge in a new area.

Intermediate sessions are appropriate for individuals with some knowledge and experience in the subject area, individuals who are mid-level managers and directors in their fields with an established degree of competence, and those seeking to build on, apply, or enhance existing knowledge.

Advanced sessions focus on in-depth knowledge and are at a high level with peer-to-peer sharing, creativity, and innovation. Topics may be highly technical or detailed, preparing learners to shape organizational strategy and aid in the growth or progress of best practices. This level is appropriate for senior staff and executives with significant expertise, knowledge, and experience who could be deemed experts in the field.

Overview sessions provide a general review of a subject area from a broader perspective and are of interest to a variety of experience levels.