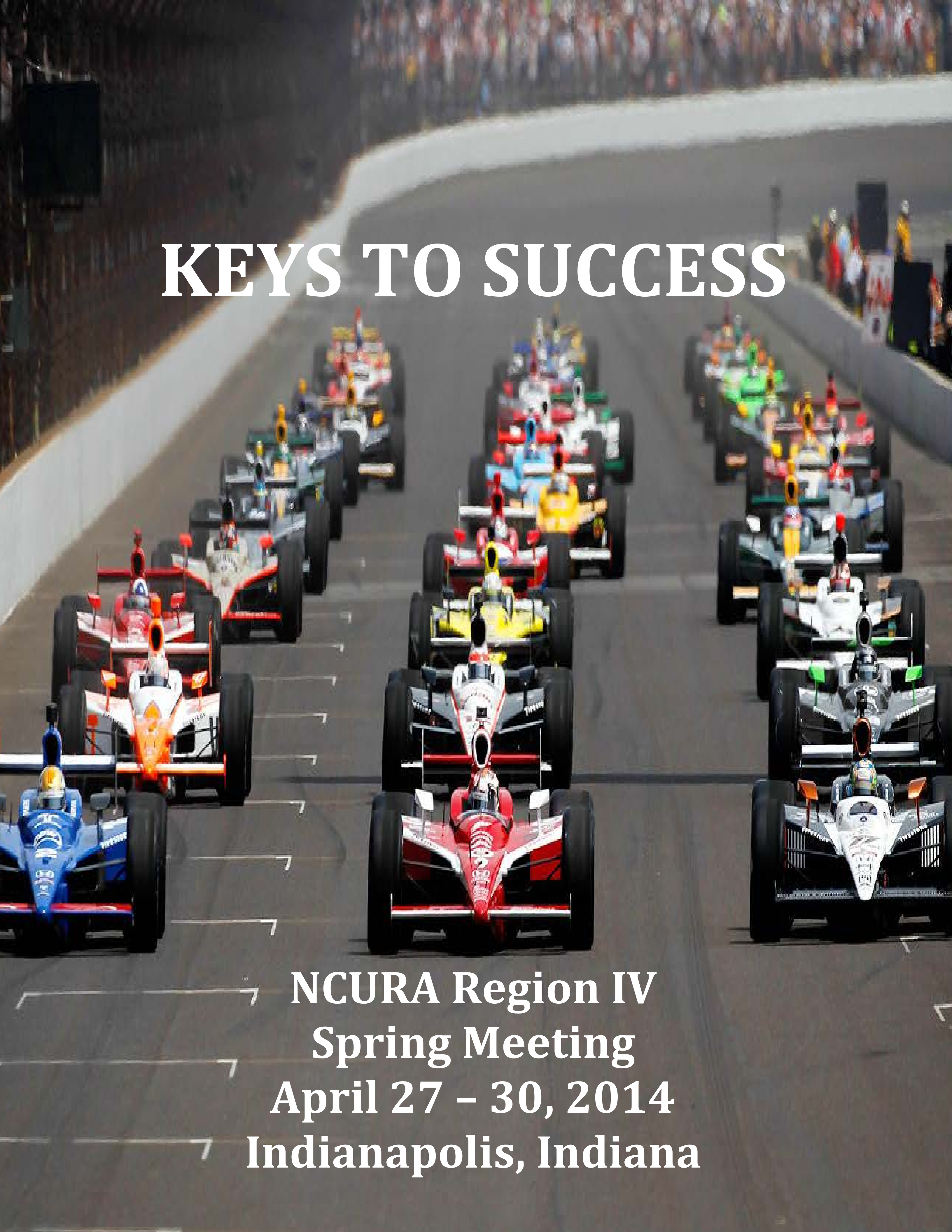

KEYS TO SUCCESS

NCURA Region IV
Spring Meeting
April 27 – 30, 2014
Indianapolis, Indiana

Welcome to Indianapolis!

This year Region IV has chosen to meet in Indianapolis, and no wonder! Indianapolis has been ranked as one of the best downtowns in the United States, with more than 200 retail shops, nearly 300 restaurants and food options, movie theaters, sports venues, museums, art galleries, and parks as attractions.

But Indy can only hope to compare to the outstanding **Region IV Spring Meeting**. With all of the research administration offerings and learning opportunities, who could compete?

You will find all of the following opportunities for your ***Keys to Success***:

Concurrent Sessions – Featuring the new International Track

- Select from a variety of tracks, including *International*, *Human Capital*, *Medical*, *Compliance*, *Predominantly Undergraduate Institutions, Financial* and *Pre-Award Research Administration,* and *Special Topics*. Also included are Federal updates from NSF and NIH.

Workshops – Designed as a complete one-day learning event or as a pre-conference warm-up

- Workshops include valuable basic instruction for pre- and post-award, how to set up training programs, navigating ethical dilemmas, managing clinical trials, research agreement basics, and the **free** effective presentations workshop.

Volunteer Opportunities – Help make the meeting a success!

- ***Newcomer Concierge:*** Available for first-time NCURA meeting attendees, you can request a "concierge" to help guide you around the conference and any related events, as well as introduce you to others.
- ***Volunteer*** at the registration desk, hospitality suite, Monday Night-Out dinner groups, newcomer reception, or as a session evaluator.
- ***Get Involved! Fair:*** Learn about the various Region IV Committees and other volunteer opportunities and sign up for those that interest you. Volunteering is a great way to network with colleagues and add value to your membership.

Networking Events –Monday Night-Out Dinner Groups

- Want to see a bit of Indy? Try the Monday Night-Out groups, featuring shopping and dinner at the *Circle Centre Mall*, the *Indianapolis Indians baseball game* with a hot dog and soda, or stroll *White River Park* while heading out to dinner. Don't forget the Region IV Dessert Mix-and-Mingle, newcomer reception, and evening hospitality suite.

Tuesday Night Event – Ever wanted to race at Indy? Here is your chance!

- Join us at the Indianapolis Marriott Downtown for an absolutely fun-filled event, complete with food and beverage fixings to whet your appetite for racing with your colleagues (join us to see it!). Dance the night away to tunes like "*Dead Man's Curve*," "*Hot Rod Lincoln*," "*409*," or one of your choice!

And don't miss our **Keynote Speaker**, Special Agent **Brian J. Haynes**, Strategic Partnership Coordinator for the FBI-Indianapolis. His topic is "***Higher Education and National Security: Bridging the Gap Between Law Enforcement, Intelligence Gathering, and Academia."*** A subject so pertinent for our current workaday world.

Don't miss out—register now and get your keys to success!

Sue Kelch	**Patience Graybill**	**Bonniejean Zitske**
Program Chair	*Program Committee Co-Chair*	*Program Committee Co-Chair*

NEW! Continuing Education Units

New this year, registrants will receive **Continuing Education Units (CEUs)** and credit for all modules and plenaries attended during the meeting. A continuing education unit is a nationally recognized measure of participation in a continuing education program, defined as 10 hours of program contact (1 CEU = 10 hours of education programming). In other countries, such as Canada, CEUs are known as Continuing Education Credits (CECs).

For attendance verification, please email a list of all modules you attended to NCURA Region IV (http://www.ncuraregioniv.com/contact.html) after May 7, 2014.

Certified Research Administrators (CRA)
The Research Administrators Certification Council (RACC) accepts credit for all modules and plenaries that you attend during the meeting. One contact hour is equal to one credit hour (1 hour 15 minute sessions = 1.25 hours; 1 hour 30 minute session = 1.5 hours).

For questions regarding CRA Certification, please contact RACC. For attendance verification, please email a list of all modules you attended to NCURA Region IV (http://www.ncuraregioniv.com/contact.html) after May 7, 2014.

Thank you to our sponsors of this year's meeting

Evisions Research Suite Web-based Solutions

MAXIMUS

RUSH UNIVERSITY

Sunday, April 27

7:30am – 5:00pm	**Registration Desk Open & Exhibits**
8:30am – 4:45pm	**All-Day Workshops**
8:30am – 12:00pm	**Morning Workshops**
10:00am – 10:30am	**Morning Workshop Break**
10:00am – 11:45am	**Get Involved! Fair**
12:00pm – 1:15pm	**Lunch**
1:15pm – 4:45pm	**Afternoon Workshops**
1:15pm – 3:15pm	**Get Involved! Fair**
2:30pm – 3:00pm	**Afternoon Workshop Break**

7:30pm – 9:00 pm **Dessert Mix & Mingle**

Meet or reconnect with colleagues and relax! Whether you were travelling or attending workshops on Sunday, this will give you a chance to power-up for the rest of the meeting. Located in the Colorado Room, we'll provide dessert and beverages and invite you to bring the conversation.

9:00pm – Midnight **Hospitality Suite**

Located in the Colorado Room, the Hospitality Suite is open each night, offering a place to unwind and join colleagues.

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.

Sunday, April 27

7:30am – 5:00pm **Registration Desk Open and Exhibits**

8:30am – 4:45pm **All-Day Workshops**

WORKSHOP #1 8:30 – 4:45
Basics of Pre-Award Research Administration

This full-day, activity-rich workshop is intended to provide an introduction to what every pre-award research administrator should know. PowerPoint and "talking heads" will be kept to a minimum! Instead, you will spend the morning with your post-award colleagues engaged in exercises that address roles and responsibilities in research administration, the lifecycle of an award, budgeting and cost-sharing, allowable costs, and different award and sponsor types.

In the afternoon session, you will break out with your pre-award colleagues to participate in activities that bring to life the roles and responsibilities specific to pre-award research administrators. Topics will include finding funding, dissecting program announcements, assembling proposals and budgets, submitting proposals, and accepting awards.

Participants will learn:

- How their job fits into the wider research administration enterprise
- New strategies for assisting faculty with proposal development and submission
- Tips and tricks that increase the chances of proposal success
- Key concepts that protect the institution's good standing and increase the likelihood of a smooth project implementation

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Craig Reynolds, *Associate Director, Office of Research & Sponsored Projects, University of Michigan*
Kirsten Yehl, *Administrative Director, Institute for Public Health and Medicine, Northwestern University*

WORKSHOP #2 8:30 – 4:45
Basics of Post-Award Research Administration

This full-day, activity-rich workshop is intended to provide an introduction to what every post-award research administrator should know. PowerPoint and "talking heads" will be kept to a minimum! Instead, you will spend the morning with your pre-award colleagues engaged in exercises that address roles and responsibilities in research administration, the lifecycle of an award, budgeting and cost-sharing, allowable costs, and different award and sponsor types.

In the afternoon session, you will break out with your post-award colleagues to participate in activities that bring to life the roles and responsibilities specific to post-award research administrators. Topics will include award acceptance and management, allowability, effort reporting, cost transfers, subcontracts and closeouts.

Participants will learn:

- How their job fits into the wider research administration enterprise
- Best practices for managing funded projects from receipt to closeout
- Techniques for handling the most common post-award problems

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Carli Carmack, *Administrative Assistant, Office of Sponsored Programs Administration, University of Missouri*
Jennifer Duncan, *Assistant Vice President for Research Administration, Division of Research, University of Houston*
Mary Beth Rudofski, *Executive Director, Financial Service Sponsored Award Accounting, University of Chicago*

Sunday, April 27

7:30am – 5:00pm **Registration Desk Open and Exhibits**

8:30am – 12:00pm **Morning Workshops**

WORKSHOP #3 8:30 – 12:00
Climbing the Mountain: How to Get Your Training Program Off the Ground

You've been asked (or you've volunteered) to set up a training program for faculty and staff who conduct or support sponsored research at your institution. When you made the commitment, you could see the mountain in the distance, but it appeared small and non-threatening—a mere bump on the horizon. Now, you've got to start climbing—and up close, the mountain looks a whole lot steeper and the hike to the top more difficult than you imagined.

This workshop will help you make the climb by providing a guide, the proper tools, and a secret map to the hidden pathways. Liz Banset will describe the process she followed to set up the University of Nebraska-Lincoln's Research Administration Management Program seven years ago, using her experience to help you start a training program for your institution.

The workshop will address several stages in developing a training program:

- Identify goals and objectives, form a program team, garner administrative support, establish a budget and research similar training programs at other institutions
- Plan the program's format and content based on the target audience and their training needs, identify salient topics for workshop sessions, and find subject-matter experts to work with you in developing workshops
- Create individual workshops within the program, determine topics to address, delivery format, and teaching methods
- Manage logistics from finding the right workshop venue to setting up schedules to registration and record-keeping
- Develop the marketing and promotion, to make sure folks who need the program hear about the program
- Implement the program with a focus on working with adult learners
- Evaluate the program's effectiveness

Liz Banset, *Learning and Development Coordinator, Office of Research and Economic Development, University of Nebraska-Lincoln*
Ashton Waite*, Proposal Development Coordinator, Office of Research and Economic Development, University of Nebraska-Lincoln*

WORKSHOP #4 8:30 – 12:00
Research Agreement Basics

This interactive workshop will provide an overview of agreement terms and conditions, both industrial and federal. It will explain the meaning of common legal terms and clauses, identify troublesome clauses, and offer alternate contract language. Topics include an overview of the types of agreements and clauses that can be problematic for institutions of higher education (including FAR and industrial negotiations). Negotiation strategies will be provided and case studies for reference.

Learning Objectives:

- Understand the various types of agreements that support university research (MTAs, NDAs, CRAs, MOUs)
- Understand common legal terms and concepts pertaining to sponsored agreements
- Learn to use the techniques taught in this workshop to improve the efficiency of contract negotiations
- Better understand the importance of particular terms for specific research projects

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Greg Luttrell, *Director, Research Contracts and Awards, University of Notre Dame*
Lauren Goralski*, Assistant Director, Office of Industry Engagement, University of Louisville*

WORKSHOP #5 8:30 – 12:00

Clinical Trials: An Administrator's Primer for Financial Management

This workshop will focus on managing the unique aspects of clinical trials, from a brief history and introduction, protocol evaluation to budget development, budget/agreement negotiation to billing for research procedures, and ultimately closeout. Attendees will be asked to participate in a discussion of each pre-award and post-award consideration to establish a better understanding of clinical trials in an academic research setting. Tools will be demonstrated and case studies used to illustrate the content.

One of the more popular segments will be a discussion of actual situations and the options faced by administrators in resolving serious issues. The goal is to find the balance between meeting patient needs, sponsor expectations, and financial performance while satisfying regulatory requirements.

Learning Objectives:

- Understand the regulatory basis of conducting clinical trials and the resources needed for their successful completion
- Learn how to determine which resources will be needed and their associated cost
- Learn how to manage the multifaceted issues that often arise during clinical trials
- Learn how to complete clinical trials and manage post-closeout obligation

Kerry Bridges, *Administrator, Clinical Research Office, Indiana University Simon Cancer Center*
Jamie Caldwell, *Director, Office of Research Services, Loyola University Chicago Health Sciences Campus*
David Lynch, *Executive Director, Office for Sponsored Research, Northwestern University*

Afternoon Workshops

WORKSHOP #6 1:15 – 4:45pm

The Whole Nine Yards: Grant Offices at Primarily Undergraduate Institutions (an Interactive Workshop)

Ever wonder what it would be like to be a lone sponsored research officer (SRO) at a Primarily Undergraduate Institution (PUI)? This workshop will allow participants to learn more about the varied challenges and skill sets needed to thrive at a PUI.

In the workshop's featured "in-basket" simulation, participants will take on the role as a newly hired SRO at a PUI. The position, vacant for two months, has a backlog of work waiting to be done. As the school's only SRO (with no support staff!), you will be charged with prioritizing all of the tasks vying for your attention and addressing the most important.

In addition to the in-basket exercise, there will be a short presentation, discussion focused on questions from participants, and a game of "Family Feud" (survey results from SROs serving at PUIs). Join us in testing your mettle and uncovering some of the mysteries of going it alone at a small, primarily undergraduate institution.

Learning Objectives:

- Identify sponsored research challenges unique to small PUIs
- Develop solutions to common challenges faced by small offices
- Explore the diversity of sponsored research responsibilities at small PUIs
- Identify qualities which contribute to a successful sponsored research office at a small PUI

Michele Bragg, *Staff Accountant, Taylor University*
Sue Gavin, *Director of Sponsored Programs, Taylor University*
Virginia Shaffer, *Academic Grants Officer, Wheaton College*

WORKSHOP #7 1:15 – 4:45pm

Ethical Dilemmas Facing Department Research Administrators

As Department Research Administrators, we are often faced with decisions that pose ethical dilemmas. Although there are rules and regulations that we need to follow, there are far more grey areas than black and white. For example, a PI asks you to order something that you feel may not be appropriate. You know you can get it done, but should you? In this session, we will discuss examples of ethical dilemmas facing Department RAs and strategies for handling them. We have our own thoughts about how to handle these situations; however, we are also looking for answers, so come prepared to share and discuss this intriguing topic with us.

Learning Objectives:

- Identify the ethical values that are important to Department Research Administrators
- Recognize unethical behavior and what to consider when faced with an ethical dilemma
- Learn the strategies and decision-making processes that provide a framework for understanding and working through ethical conflicts

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Diane Hillebrand, *Grants & Contracts Officer and Staff Senate President, Office of Research Affairs/Grants Management, University of North Dakota School of Medicine and Health Sciences*

Jim Maus, *Senior Research Administrator, Division of Infectious Diseases, Department of Internal Medicine Washington University School of Medicine*

Mary Nutt, *Research Administration, Department of Surgery, University of Wisconsin School of Medicine and Public Health*

WORKSHOP #8 1:15 – 4:45pm

Effective Presentations FREE! FREE! FREE!

As an administrative professional and NCURA member, you often may need to explain issues surrounding sponsored research and the administration of grants and contracts. The purpose of this workshop is to give some insights into effective presentation styles, techniques, and technology. The session will also explore the crafting of learning objectives, adult learning strategies, and the complexities of team presentations, particularly those that involve colleagues from other institutions.

Learning Objectives:

- Participants will gain a fundamental understanding of adult learning styles
- Participants will be able to begin planning an NCURA Concurrent Session

FREE! FREE! FREE!

Jeffrey Ritchie, *Director of Sponsored Programs, Lewis University*

7:30pm – 9:00pm **Dessert Mix & Mingle in Hospitality Suite**

Meet or reconnect with colleagues and relax! Whether you were travelling or attending workshops on Sunday, this will give you a chance to power-up for the rest of the meeting. We'll provide dessert and beverages and invite you to bring the conversation. The Hospitality Suite is located in the Colorado Room.

9:00pm – 12:00 midnight **Hospitality Suite Open**

Located in the Colorado Room, the Hospitality Suite is open each night, offering a place to unwind and join colleagues.

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.

Monday, April 28

7:30am – 5:00pm **Registration Desk Open & Exhibits**

7:30am – 8:30am **Continental Breakfast**

8:30am – 10:15am **Keynote Speaker**

10:15am – 10:30am **Morning Break**

10:00am – 11:45am **Get Involved! Fair**

10:30am – 12:00pm **Concurrent Session**

12:00pm – 1:30pm **Awards and Recognition Lunch**

1:30pm – 2:45pm **Concurrent Session**

1:15pm – 3:15pm **Get Involved! Fair**

2:45pm – 3:15pm **Afternoon Break**

3:15pm – 4:30pm **Concurrent Session**

4:30pm – 5:30pm **Newcomers' Reception**

Everyone new to NCURA or new to the Regional Meeting is invited to join Region IV leadership in the Colorado Room for refreshments and to learn more about the organization. From here we will help connect you with your Dinner Group.

5:30pm – 9:00pm **Monday Night Dinner Out**

Sign-up near the Registration Desk to join other NCURA attendees and experience the local fare Indianapolis has to offer. Dinner Groups will meet in the lobby at 5:30pm for reservations at nearby restaurants.

9:00pm – Midnight **Hospitality Suite**

Located in the Colorado Room, the Hospitality Suite is open each night, offering a place to unwind and join colleagues.

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.

Monday, April 28

7:30am – 5:00pm **Registration Desk Open and Exhibits**

7:30am – 8:30am **Continental Breakfast**

8:30am – 10:15am **Keynote Speaker**

Special Agent Brian J. Haynes
Strategic Partnership Coordinator for the FBI-Indianapolis

Topic: *Higher Education and National Security: Bridging the Gap Between Law Enforcement, Intelligence Gathering, and Academia*

Brian J. Haynes has been a Special Agent with the FBI for 11 years and is currently assigned as the Strategic Partnership Coordinator within the Counterintelligence (CI) Program. He is responsible for coordinating with and providing CI defensive briefings to U.S. Department of Defense contract companies, as well as private-sector and academic organizations. Special Agent Haynes works in the FBI Indianapolis Field Office and was previously assigned to the FBI Buffalo, NY Field Office, and the Operational Technology Division in Quantico, VA. Prior to the FBI, he was enlisted in the U.S. Army, having served in Operation Desert Storm, and spent five years as a police officer in Florida.

10:15am – 10:30am **Morning Break**

10:30am – 12:00pm **Monday Concurrent Sessions**

The Announcement (FOA, PA, PAR, PAS, RFA, RFP, etc.) and the NOA – What Do They Tell You?
Pre-Award Research Administration, Basic, Concurrent Session

Using slides, games, personal experience from both a department perspective and central office perspective, and Q&A, we will explore the myriad of ways in which funding opportunities are announced by both federal and non-federal funders, providing useful links for reference. We will also look at certain announcements, both federal and non-federal, grants and contracts, to explain what to look for and make note of. We will then examine some federally funded and foundation NOAs to highlight standard language and terms often overlooked.

Learning Objectives:

- Identify key guidelines in federal and non-federal funding opportunity announcements
- Understand the importance of communicating with key persons involved in proposal preparation and review
- Understand how to review award notices and identify important terms, conditions and reporting requirements
- Make the process easier by developing a checklist for reviewing funding opportunities and award notices

Bonnie Dee, *Contract and Grant Coordinator, Washington University St. Louis*
John Philipps, *Senior Grants and Contract Manager, University of Chicago*

Overview of Clinical Trials
Medical/Departmental Research Administration, Basic, Concurrent Session

Introducing the basics of clinical trials from definition to contract negotiation. We will cover everything from human subject protections to significant contract terms. We will discuss definitions of trials and phases, regulatory impacts and protections of subjects that have to be considered, and how to work with the sponsor in order to be successful.

Learning Objectives:

- Demonstrate working knowledge of different phases of a clinical trial
- Identify key compliance issues related to a trial
- Describe key financial considerations and potential approaches to handling

Patrick Medina, *Director, Grants and Contracts Services; Associate Director, Research and Sponsored Programs University of Wisconsin-Madison*

Larry Westby*, Administration Officer, Research and Sponsored Programs, University of Wisconsin-Madison*

10:30am – 12:00pm **Monday Concurrent Sessions**

Post-Award for the Departmental Administrator

Financial Research Administration, Basic, Concurrent Session

Post-award checks and balances on a department level are intricate to the successful management of sponsored grants. We will discuss the monthly monitoring of sponsored programs and how this creates interpersonal relationships with faculty to help them successfully manage their grants. Monthly review helps create accountability in the management process, decreases the need for payroll and other transfers, creates consistency in payroll and effort compliance and helps the PI identify when problems will arise so that the department and the PI can be proactive instead of reactive to problems that may arise during the award period. In doing this, it keeps the status of the grant fresh in the RA's mind so that they are aware of upcoming progress reports and any changes to the aims of the grant and closeouts.

Tasneem Uting, *Manager of Research Administration, Department of Preventive Medicine, NUCATS and Galter Library, Northwestern University*
Cheryl Lyons, *Research Administrator, Washington University*

Unlocking A Quality Management System's Potential

Special Topics, Intermediate, Concurrent Session

Using a Quality Management System (QMS) to monitor sponsored projects pinpoints areas where there is an opportunity to create more effective and efficient processes. To unlock a QMS's potential, a self-monitoring system that identifies when processes reach predefined control limits needs to be established.

Learning Objectives:

- Explain the key components of an effective QMS
- Illustrate helpful tools that can be used to self-monitor
- Discuss importance of control limits and defined escalation processes

Michelle Wood Jensen, *Manager, Finance and Accounting Services, Mayo Clinic*
Nicole Lies, *Finance and Accounting Services, Mayo Clinic*

Let's Collaborate NCURA – NCURA Professional Social Platform

Overview, Basic, Concurrent Session

This session will introduce you to NCURA's new professional networking platform, *Collaborate*! Every NCURA member has a profile, and we'll show you how to update it and make connections and contacts with your colleagues. C*ollaborate* hosts topical communities, including Pre-Award, Financial Research Administration, International, PUI, Electronic Research Administration, Departmental and Compliance. Each community has resources and listserv discussions where members continually connect and share information, including documents and videos. This is a benefit of your membership in NCURA—have your professional networking powered by NCURA!

Learning Objectives:

- NCURA members will be able to understand, use, and explore NCURA's *Collaborate*

Stephanie Moore, *Community Curator, National Council of University Research Administrators*

Effort Certification and Policy Development

Primarily Undergraduate Institution

Effort certification is a requirement made by the federal government. This session will provide an overview of effort certification and developing and implementing an effort policy for an institution managing a paper-based effort system.

Learning Objectives:

- Understand effort reporting, why it's necessary, and the requirements per federal regulations
- Develop a policy to help your institution manage effort reporting
- Learn tips and tricks for managing a paper-based effort reporting system

Christin Nelson, *Grants and Contracts Officer, University of North Dakota*

10:30am – 12:00pm **Monday Concurrent Sessions**

Campus-wide Adventures in FCOI Continue

Compliance, Intermediate, Case Study

This case study will look at how the University of Missouri implemented processes to address the PHS FCOI regulations, with particular attention to new challenges and lessons learned in the first year and a half under the revised requirements. Representatives from the COI Office and the central Sponsored Programs Office will discuss the processes from their unique perspectives and discuss how those processes work in tandem to ensure compliance. Join us for a review of one approach and bring your knowledge and questions to share!

Learning Objectives:

- Understand the University of Missouri's processes in monitoring awards and subawards under the PHS requirements
- Review the University of Missouri's method of analyzing for relatedness and for Financial Conflict of Interest
- Explore approaches to conduct retrospective review and determination of bias

Sierra Clark, *Compliance Officer, University of Missouri-Columbia*
Jennifer May, *Director, Research Compliance Services, University of Missouri-Columbia*

12:00pm – 1:30pm **Lunch and Recognition Awards**
Join us as we recognize our colleagues' success and accomplishments!

1:30pm – 2:45pm **Monday Concurrent Sessions**

National Science Foundation Update

Federal, Intermediate, Update

This session is a comprehensive review of what is new and developing with the National Science Foundation's programs, policies, people, and budgets. Participants will learn about changes affecting their institution and new programs of interest to their researchers.

Beth Strausser*, Senior Policy Specialist, Policy Office, Division of Institution & Award Support, National Science Foundation*

Establishing a New Sponsored Programs Office

Primarily Undergraduate Institute, Intermediate, Concurrent Session

"Good Morning, Mr. Phelps. Your mission, should you decide to accept it, is to establish a Sponsored Programs Office. Good luck, Mr. Phelps." Well, Mr. Phelps, you accepted and now you have to accomplish what looks like an impossible mission. But you are up to it. All you need to know are the booby-traps to avoid, how to assemble a high-functioning team, and the basic rules of the grants game. You will get pointers from presenters and colleagues who have been through those early days of developing a sponsored programs office.

Learning Objectives:

- Enumerate the resources required to start a sponsored programs office and avoid common pitfalls
- Construct a sponsored programs workflow that articulates institutional context
- Articulate a strategy for communicating your office's pre- and post-award role to faculty and administration

Larry Grieshaber, *Director of Sponsored Programs and Accreditation, Maryville University of St. Louis*
Jeffrey Ritchie, *Director of Sponsored Programs,* Lewis University

1:30pm – 2:45pm **Monday Concurrent Sessions**

Intellectual Property Issues in Clinical Trials: Rogaine and Brown M&Ms

Medical/Departmental Research Administration, Intermediate, Concurrent Session

This session will provide a brief overview of intellectual property in clinical trials, how it arises, and how it affects the agreement. It will provide negotiators with the knowledge and tools necessary for honest risk assessment and management of intellectual property issues in clinical trials, point out specific issues of note, and provide certain successful resolutions from past experience. Ideally, it will enable attendees to have relevant policy discussions with administration upon return to the office.

Learning Objectives:

- Identify and resolve key issues regarding intellectual property in clinical trial agreements
- Analyze and revise internal policies regarding intellectual property in clinical trials in light of actual risk and resolutions

Matthew Hawthorne, JD, MBA, *Technology Transfer Officer II, University of Louisville*

Building A Timeline For Successful Proposal Submissions

Pre-Award Research Administration, Intermediate, Concurrent Session

Tired of last-minute proposals draining the life from you and your central sponsored research office? They come in like a hurricane and often leave a path of destruction in its wake. However, what if your PI gave you advance warning on an upcoming submission? After you pick yourself up off the floor, how do you go about setting up your internal timeline? We will look at this age-old problem and share the outcomes of how we are building partnerships between department research administrators and central sponsored offices for the timely and successful submission of proposals.

Eugenie Chao*, Grants Officer, Office for Sponsored Research, Northwestern University*
Tasneem Uting*, Manager of Research Administration, Department of Preventive Medicine, NUCATS and Galter Library, Northwestern University*

Strategic Planning

Financial Research Administration, Advanced, Discussion Group

How do you prepare your research team to succeed in a changing environment? Use your strategic plan as a tool to grow your research empire. During this session, we will discuss strategies and tactics of developing and implementing an action plan in research administration based on your institution's strategic plan.

Amy Kitzman, *Associate Center Administrator, Northwestern University*
Chrissy Kelly*, Center Administrator, Northwestern University*

How to Make FastLane and Grants.gov Work for You

Pre-Award Research Administration, Basic, Concurrent Session

Are you new to using Grants.gov or NSF FastLane? Looking for additional ways to streamline the process of completing a proposal in either system? This session is for you. We will cover the basics of using each system and what is required to submit a proposal. We will also provide tips and best practices that we've learned along the way that may help you.

Learning Objectives:

- Attendees will learn how to navigate Grants.gov and FastLane
- Attendees will learn where the requirements are for completing a proposal in Grants.gov and FastLane
- Attendees will learn some tips and best practices from the presenters' experiences using both systems

Tamara Kuhn Martin*, Research Administrator, College of Engineering-Research Services*
University of Wisconsin-Madison

1:30pm – 2:45pm **Monday Concurrent Sessions**

Intercultural Communication: Research Administrators in a Global Environment

International, Basic, Case Study

Succeeding in a global research environment is often driven by communication and collaboration. But sharing information across different cultures and social groups can pose unique challenges for university faculty and research administrators. In the words of noted anthropologist and cross-cultural researcher, Edward T. Hall, "Culture hides more than it reveals, and strangely enough what it hides, it hides most effectively from its own participants." During this interactive session, case studies will be used to help participants identify ways cultural differences may impact the effectiveness of communications.

Learning Objectives:

- Identify cultural differences that contribute to communication challenges
- Understand low-context and high-context cultures
- Determine how you feel about communicating in different ways

Jeremy Miner, *Director of Grants and Contracts, University of Wisconsin-Eau Claire*

2:45pm – 3:15pm **Afternoon Break**

3:15pm – 4:30pm **Concurrent Sessions**

National Institutes of Health Update

Federal, Intermediate, Update

This session covers the latest news from the National Institutes of Health, including budget information, current policy topics, policy reminders, and updates on NIH eRA activities.

Tony Corio, *Grants Policy Analyst, Office of Policy for Extramural Research Administration, Division of Grants Policy*

Proposal Development Officer vs. Peer Reviewer: How to Help PIs When You are Not a Subject Matter Expert

Pre-Award Research Administration, Intermediate, Discussion Session

Proposal development professionals face unique challenges in working with faculty and their proposals, particularly in assessing and editing their proposal drafts. Sometimes we need to prove the "value" that our position brings, or give advice on how to strengthen a proposal without having a clue about the science being discussed. This interactive session will discuss strategies to help you establish trust with faculty, provide objective feedback, understand the basics of a scientific area, and demonstrate your value to the grant process. Please bring your questions and best practices to share!

Learning Objectives:

- Establish trust and credibility with PIs when you don't know their exact science
- Learn how to give PIs feedback on their proposal set-up and writing without critiquing the science
- Demonstrate the value of your experience and role to faculty

Michelle Schoenecker*, Senior Proposal Development Manager, University of Wisconsin-Milwaukee*
Tricia Callahan*, Director Proposal Development, Miami University*

3:15pm – 4:30pm **Monday Concurrent Sessions**

Mentoring Our Own – MOO!

Human Capital, Overview, Concurrent Session

Region IV is building on its first year of creating mentoring matches made in heaven by inviting you to learn about the program's second year. You don't have to be a current Mentee or Mentor to attend. Mentoring enthusiasts will provide an overview of the program, outline expectations for the mentor/mentee roles, and those in the second-year class will have an opportunity to meet one another. Please join us to share your ideas on how Region IV can continue to develop the MOO program and build upon the lessons learned from our inaugural year.

Learning Objectives:

- Provide an overview of the Region IV Mentoring Our Own program
- Relay expectations of mentors and mentees
- Foster opportunities for mentors and mentees to meet

Diane Hillebrand, CRA, *Grant and Contract Officer, School of Medicine and Health Sciences, University of North Dakota*
Jennifer Duncan, *Assistant Vice President for Research Administration, Division of Research, University of Houston*

Horizon 2020: An EU Funding Opportunity

International, Basic, Concurrent Session

Horizon 2020, the European Union's €80b seven-year initiative for research and innovation, recently issued its first call for proposals. As with the previous EU framework program, where one in five projects included an international partner, Horizon 2020 stresses the importance of international cooperation in science and technology. It is anticipated the new funding program will provide opportunities for U.S. investigators to not only partner but also lead a research consortium; however, it comes with some unique challenges for U.S. institutions. Join this session to better understand the Horizon 2020 opportunities for collaboration and the challenges that U.S. institutions will face.

Learning Objectives:

- Review the Horizon 2020 funding opportunities for U.S. institutions
- Highlight some of the challenges for U.S. institutions in participating or accepting Horizon 2020 funding
- Understand the basics of the Horizon 2020 Proposal submission process

David Richardson, *Associate Vice Chancellor for Research, University of Illinois at Urbana-Champaign*

Embracing Chaos, Change, Customer Service, and Compliance

Human Capital, Intermediate, Concurrent Session

Research administration, whether you work in a central office or a department, sometimes feels chaotic. Internal and external changes require administrators and teams to be adaptable yet remain compliant. Demand for "better" customer service seems to increase when the chaos seems to be growing. Balancing this chaos requires vigilance and flexibility by the administrator and the team. This session will explore tips and techniques for building flexible, integrated teams with the goal of breaking down the internal and external silos that hamper flexibility and slow down change.

Learning Objectives:

- Understand the importance of a team approach to problem-solving in the context of research administration
- Develop strategies for building successful teams
- Begin to recognize potential pitfalls to be encountered during implementation

Patrick Medina, *Director, Grants and Contracts Services; Associate Director, Research and Sponsored Programs, University of Wisconsin-Madison*

3:15pm – 4:30pm **Monday Concurrent Sessions**

Constructing Multi-Center Trials: A Coordinating Center Employment of Novel Thinking (ACCENT)

Medical/Departmental Research Administration, Advanced, Discussion

It seems to be a prerequisite to develop a catchy title that can be turned into an acronym to describe a multi-site trial, but there are many more aspects that need to be addressed! This session will address many of the challenges related to structuring, proposing, and ramping up over multiple institutions. While focusing on the perspective of the financial/ contracting coordinating center, we will discuss reasonable ways to propose financial reimbursement plans across sites, site participation in the proposal process, and approaches to agreements.

Learning Objectives:

- Identify potential financial models for proposing and administering multi-site trials
- Articulate the definitions and subagreement options of contracted services and subcontracts
- Describe approaches to negotiating site reimbursements

Heather Offhaus, *Director Grant Review & Analysis, University of Michigan Medical School*
Valerie Stevenson, *Administrative Director, Neurological Emergencies Treatment Trials Network, University of Michigan*

Policy and Procedure at PUI: Phew!

Primarily Undergraduate Institute, Basic, Discussion

Research administrators at PUIs are often the lone rangers in developing, enforcing, and complying with research policy and procedures at their institutions, and often need to educate faculty, staff, and administration who have little to no experience in these areas. Designed for novices and experts alike, our discussion includes a wide range topics, including terminology, best practices for compliance, developing relationships with key institutional partners, and using existing resources. This open discussion invites questions as well as stories about what has worked and what hasn't at PUIs.

Learning Objectives:

- Understand the terminology (policy vs. procedure vs. guideline) and how to apply it
- Understand the resources available at all stages of policy development at a PUI and the characteristics of the process
- Gain perspective on best practices for policy development (i.e., good policy vs. bad policy)
- Learn to anticipate pre- and post-planning steps, including training and communication, implementation, unintended consequences, compliance, and audit issues

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Sandra Shumaker, *Executive Director of Research and Sponsored Programs, Bradley University*
Erica Franich, *Director of Grants and Contracts, Northern Michigan University*

4:30pm – 5:30pm **Newcomers Reception**

Everyone new to NCURA or new to the Regional Meeting is invited to join Region IV leadership in the Colorado Room for refreshments and to learn more about the organization. From here we will help connect you with your Dinner Group.

5:30pm – 9:00pm **Dinner Groups**

Sign-up near the Registration Desk to join other NCURA attendees and experience the local fare Indianapolis has to offer. Dinner Groups will meet in the lobby at 5:30pm for reservations at nearby restaurants.

9:00pm – Midnight **Hospitality Suite**

Located in the Colorado Room.

Please wear your name badge to all events, concurrent sessions, and evening networking events.

Tuesday, April 29

7:30am – 5:00pm	**Registration Desk Open & Exhibits**
7:30am – 8:30am	**Continental Breakfast**
7:30am – 9:00am	**Get Involved! Fair**
8:30am – 10:00am	**Concurrent Sessions**
9:00am – 10:30am	**Get Involved! Fair**
10:00am – 10:30am	**Morning Break**
10:30am – 12:00pm	**Concurrent Sessions**
12:00pm – 1:15pm	**Lunch**
1:15pm – 2:15pm	**Concurrent Sessions**
2:15pm – 2:45pm	**Afternoon Break**
2:15pm – 4:00pm	**Get Involved! Fair**
2:45pm – 3:45pm	**Concurrent Sessions**
3:45pm – 4:00pm	**Afternoon Break**
4:00pm – 5:00pm	**Concurrent Sessions**
6:00pm – 10:00pm	**Tuesday Night Event**

Join us for an absolutely fun-filled event, complete with food and beverage fixings to whet your appetite for racing with your colleagues (join us to see it!). Dance the night away to tunes like "Dead Man's Curve," "Hot Rod Lincoln," "409," or one of your choice!

9:00pm – Midnight **Hospitality Suite**

The Hospitality Suite is open each night, offering a place to unwind and join colleagues. Located in the Colorado Room.

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.

Tuesday, April 29

7:30am – 5:00pm **Registration Desk Open and Exhibits**

7:30am – 8:30am **Continental Breakfast**

8:30am – 10:00am **Tuesday Concurrent Sessions**

Large Collaborative Proposal Development and Contract Negotiations

Pre-Award Research Administration, Intermediate, Concurrent Session

This session will focus on the processes for preparing large collaborative proposals involving multiple types of organizations, (foreign, corporate, small business, educational institution, and hospital). We will discuss the types of agreements that may be needed prior to proposal preparation and subsequent to receipt of an award, and we will lead an interactive learning exercise where participants are divided into teams representing different types of entities to discuss potential concerns that each entity may have about the proposed project and how to use various tools and agreements to alleviate issues.

Learning Objectives:

- Learn best practices for developing large, collaborative projects from the perspective of the types of entities that may be involved
- Learn the contractual framework necessary for working with various entities
- Learn strategies for managing the development of large, complex proposals

Jean Mercer, *Director of Grant Services, Indiana University*
Tammy Good, *Associate Director of Grant Services, Indiana University*

Senior Hot Topics Forum

Compliance, Overview, Panel Discussion

In this session we will cover the upcoming changes to subrecipient monitoring that are required under the new OMB regulations, and share strategies to implement the changes to keep subawards on a smooth course. We will also address NIH subaccounts and what that means for existing subawards.

Learning Objectives:

- Discuss impact of OMB's final guidance at the institutional level
- Explore any items of concern for the research community

Greg Luttrell*, Director, Research Contracts and Awards, University of Notre Dame*
Jamie Caldwell*, Director, Office of Research Services, Loyola University Chicago Health Sciences Campus*
David Richardson*, Associate Vice Chancellor for Research, University of Illinois at Urbana-Champaign*
Justin Miller*, Director, Sponsored Programs Office, Ball State University*

Choosing a Career Path in Research Administration

Human Capital, Overview, Discussion

Whether you are new to research administration or farther along in your career, or want to improve or change your career, there are things you should be thinking about. Do you see yourself in pre- or post-award? Central or departmental? Have you explored the possibilities? The path you have chosen or, perhaps more importantly, the choice you face moving forward is influenced by many factors. One path leads to a wonderful fulfilling career, the other leads to madness and despair. This discussion will get you thinking about your options now, so you're better prepared when it's time to choose or alter a career path. Choose wisely.

Patrick Medina, *Director, Grants and Contracts Services; Associate Director, Research and Sponsored Programs, University of Wisconsin-Madison*

Jim Maus, *Senior Research Administrator, Division of Infectious Diseases, Department of Internal Medicine Washington University School of Medicine*

8:30am – 10:00am **Tuesday Concurrent Sessions**

Introduction to the Uniform Guidance

Federal, Intermediate, Concurrent Session

The Federal government has released the new Uniform Guidance and we're all scrambling to figure out the *What? When? Where?* and *Why?* Join us for an introductory conversation on the Guidance. We'll take a look at some of the biggest changes that affect research administration and discuss what they may mean for the awards we manage.

Learning Objectives:

- Learn the information that universities need to understand about what the Uniform Guidance means and how it will affect our current policies and business practices.

Jennifer Rodis, *Policy Analyst, Research and Sponsored Programs, University of Wisconsin-Madison*
Bonniejean Zitske*, Managing Officer, Research and Sponsored Programs, University of Wisconsin-Madison*

Training for International Collaborators: Taking Research Administration Around the World

International, Intermediate, Concurrent Session

As research collaborations and funding becomes increasingly global, the needs and requests for research administration training are also growing. Research administrators can be found in all corners of the world and we all want to know how to do our work better. But what does that mean when you are asked to train colleagues overseas? Not all concepts are universal and not every PI or administrator needs to understand the Federal circulars. Join us as we share our insights on developing training materials for our international colleagues. Learn what is important and what can get lost in translation.

Learning Objectives:

- Learn communication and teaching methods that effectively present research administration topics to global audiences
- Recognize common barriers in presenting complex material internationally
- Develop strategies for building trainer knowledge in cultural and political aspects of global collaboration

Robert Andresen, *Director of Research Financial Services, Associate Director Research and Sponsored Programs University of Wisconsin-Madison*
Craig Reynolds, *Associate Director, Office of Research & Sponsored Projects, University of Michigan*
Heather Offhaus, *Director Grant Review & Analysis, University of Michigan Medical School*

Supporting Undergraduate Research at a PUI

Primarily Undergraduate Institute, Basic, Concurrent Session

The role of sponsored programs in supporting undergraduate research can vary from nil to having the primary responsibility for the undergraduate research enterprise. In this session we will explore why an office of sponsored programs should be involved in undergraduate research and how the office can facilitate and support undergraduate research.

Learning Objectives:

- Identify the advantage of encouraging undergraduate research at a PUI
- Identify strategies for engaging faculty and students in undergraduate research
- Identify the ways in which an Office of Sponsored Programs can support undergraduate research

Larry Grieshaber, *Director of Sponsored Programs and Accreditation, Maryville University of St. Louis*

10:00am – 10:30am **Morning Break**

10:30am – 12:00pm **Concurrent Sessions**

10:30am – 12:00pm **Tuesday Concurrent Sessions**

Dashboard Metrics: Using Data to Speed Along and Avoid Sputtering Out

Special Topics, Intermediate, Concurrent Session

Do you know where to focus attention in your research enterprise? The development and use of research administration and resource metrics are key to identifying where to spend limited funds to focus on process improvements while delivering high value to faculty and leadership. We will explore the key elements—and challenges—of collecting and displaying data sets in order to leverage analytics. We will share examples of dashboards and approaches used to manage everyday expectations, prioritize and manage compliance issues, and the use of physical resources.

Learning Objectives:

- Identify necessary elements of data collection and structure
- Identify qualities of key metrics to measure an enterprise
- List several metrics in use at other institutions as potential metrics to implement

Heather Offhaus, *Director, Grant Review and Analysis, University of Michigan*
Michelle Melin-Rogovin*, Associate Director of Research Administration, Research Administration Services Northwestern University*
Bryan Runkel*, Research Administrator, Research Administration Services, Northwestern University*

A Fulbright Can Change Your Life

International, Basic, Concurrent Session

The Fulbright Program sends nearly 800 American scholars to 125 countries each year, and each person comes back changed. Fulbright Ambassador Dom Caristi shares his personal and professional changes from his Fulbright grants to Slovenia and Greece. Learn how you can apply and what to consider in preparing an application in this informative session.

Dominic Caristi, *Fulbright Ambassador*

Encouraging Faculty Submissions: Case Studies from Ball State and Southern Illinois Edwardsville

Primarily Undergraduate Institute

Learn about the various internal and incentive programs used by Ball State University and Southern Illinois University, Edwardsville. Internal funding program, incentive funds, and non-monetary recognition programs will be discussed, among other opportunities. Curriculum, target audiences, publicity and outcomes will be discussed.

Learning Objectives:

- Discover the programs available to increase faculty participation in proposal development

Justin Miller, *Director, Sponsored Programs, Ball State University*
Sarah Lee, *Proposal Manager, Sponsored Programs, Ball State University*
Susan Morgan, *Associate Dean for Research, Pre-Award Services, Southern Illinois Edwardsville University*
Patience Graybill, *Research Administrator, Pre-Award Services, Southern Illinois Edwardsville University*
Teri Gulledge, *Research Administrator, Pre-Award Services, Southern Illinois Edwardsville University*

Subrecipient Monitoring

Compliance, Intermediate, Concurrent Session

In this session we will cover the upcoming changes to subrecipient monitoring that are required under the new OMB regulations and share strategies to implement the changes to keep subawards on a smooth course. We will also address NIH subaccounts and what that means for existing subawards.

Learning Objectives:

- Review the Omni Circular guidance for subcontracts and learn strategies to implement the new requirements
- Address the NIH subaccount impact on subcontracts and provide institutional implementation strategies
- Review the HHS Pilot on Whistleblower Protections flow-down requirements for subcontracts

Tyra Darville-Layne, *Senior Grant and Contract Officer, Office of Sponsored Research, Northwestern University*
Andrea Marshall, *Principal Grant Administrator, Sponsored Projects Administration, University of Minnesota*

10:30am – 12:00pm **Tuesday Concurrent Sessions**

Creating a Culture of Compliance at PUIs

Primarily Undergraduate Institute, Intermediate, Case Study

Compliance with federal, state, institutional, and private-sector policies is a complex endeavor in several respects. While the legal requirements are similar for all institutions, the implementation of policies and procedures must vary according to the nature of each institution. This session will describe how a Predominately Undergraduate Institution is working to build a campus culture that understands and supports a new compliance policy which includes conflict of interest, nepotism, conflict of commitment, financial management, and human subjects protection.

Learning Objectives:

- Understand an organic approach to compliance
- Learn a variety of strategies to create a culture of compliance

John Falconer, *Director of Sponsored Programs, University of Nebraska at Kearney*
Kenya Taylor, *Associate Vice Chancellor for Academic Affairs, University of Nebraska at Kearney*

12:00pm – 1:15pm **Lunch**

1:15pm – 2:15pm **Tuesday Concurrent Sessions**

Fun with Effort Reporting

Special Topics, Advanced, Concurrent Session

Effort reporting just won't go away. Though it sounds like a simple concept, people with experience know there are many factors that can quickly reduce this administrative exercise to a bureaucratic nightmare. There aren't many financial compliance issues that can draw the wrath from PIs as fast as this one—just try explaining why a faculty member can't exclude proposal writing from their University activities when they wrote their proposals on the weekend. This session will focus on key principles for good management for effort reporting: policies and procedures, training programs, documentation, and oversight. We will also discuss common issues that have arisen in a number of OIG audits. Session participants should plan to engage in a conversation with the presenters and bring suggestions and questions.

Learning Objectives

- Understand federal regulatory requirements and how they may be met through institutional policy
- Learn about key considerations in effort reporting
- Gain insight into potential strategies for program consideration at your own institution

Matt Richter, *Effort Administrator, ERCT Manager, University of Wisconsin-Madison*

NCURA Exchange Program

International, Basic, Concurrent Session

As research becomes an increasingly global endeavor, research administrators increasingly need to understand a vast array of international practices, procedures, and policies. The NCURA Exchange Program is a joint initiative with other international research administration societies that provide opportunities for mutual learning and knowledge exchange. In this session, an NCURA fellow and international host site will share their cultural experiences with Portugal and South Africa, highlighting best practices and lessons learned.

Learning Objectives:

- Provide an overview of the NCURA International Fellowship Program
- Learn how to apply to be an International Fellow at an NCURA partner institution or host an Fellow at your institution

Thomas Wilson, *Senior Research Administrator, Rush University Medical Center*
Jeremy Miner, *Director of Grants and Contracts, University of Wisconsin-Eau Claire*

1:15pm – 2:15pm **Tuesday Concurrent Sessions**

The Clinical Fellow and Training Grants

Medical/Departmental Research Administration, Intermediate, Discussion

Do you have post-docs in accredited fellowship programs on your training grant? Who tracks their effort? How much time are they spending in the clinic? What about their moonlighting activities? This interactive session will discuss the intricacies related to fellows' activities while appointed to training awards. Bring your problems, solutions, and best practices on how you deal with these complex issues at your institution.

Nancy Reidelberger, *Research Administrator, Division of Oncology, Washington University*
Cheryl Lyons, *Research Administrator, Division of Molecular Oncology, Washington University*

Leadership and Volunteering with NCURA

Human Capital, Overview, Discussion Group

You love your career in research administration: you get to work on a team with talented faculty to develop proposals, you are a resource for grant and contract information, and you really feel the work you do makes a difference in this world. But what about you and your career? Professional organizations like NCURA are designed to allow members to develop their leadership skills and promote networking through a myriad of volunteer opportunities. Come meet some of your fellow NCURA Region IV members and hear how volunteering with NCURA has developed both careers and friendships.

Learning Objectives:

- Provide an overview of leadership and volunteering opportunities within NCURA
- Create an interest in leadership and volunteering opportunities
- Encourage engagement and sharing of ideas and stories to enhance programs

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Greg Lutrell, *Director, Research Contracts and Awards, University of Notre Dame*
David Ngo, *Assistant Vice President, Sponsored Programs Administration, University of Texas Southwestern Medical Center*
Kirsten Yehl, *Administrative Director, Institute for Public Health and Medicine, Northwestern University*

Cost Principles: It Depends!

Financial Research Administration, Basic, Concurrent Session

Come and learn about the cost principles that govern university research. Discuss areas that fall into the realm of gray. Learn how to say yes while you are really saying no.

Learning Objectives:

- Provide a basic level of understanding of the cost principles used by a university
- Understand topics such as A-21 circular, Section J, cost principles and allowable versus unallowable costs
- Understand what is necessary, reasonable, allocable, allowable, and permissible

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Charlie Giese, *Research Program Manager, University of Wisconsin-Madison*
Diane Hillebrand, *Grants & Contracts Officer and Staff Senate President, Office of Research Affairs/Grants Management, University of North Dakota School of Medicine and Health Sciences*

1:15pm – 2:15pm **Tuesday Concurrent Sessions**

Faculty Education (Don't Call it Training) and Outreach at PUIs

Primarily Undergraduate Institute, Intermediate, Case Study

Just as the faculty members we work with are finding new and innovative ways to reach their students, sponsored programs offices are having to find new and innovative ways to reach out to their faculty. This session will discuss the various educational programs and outreach tools used by Ball State University in reaching out to faculty members. There will also be time for attendees to share best practices and lessons learned from their own institutions.

Learning Objectives:

- Learn various educational programs to help faculty better understand the proposal development process
- Discuss curriculum, target audiences, publicity, and outcomes

Justin Miller, *Director, Sponsored Programs Office, Ball State University*
Stanley Geidel, *Program Manager, Sponsored Programs Office, Ball State University*
Jessie Roarke, *Research Information Coordinator, Sponsored Programs Office, Ball State University*

Policy Review and Revision After the Omni Circular: How Can We Approach This Staggering Task?

Federal, Intermediate, Concurrent Session

The reform of OMB guidance through the consolidation of eight Federal circulars was a massive undertaking at the Federal level. Now, it's time for universities to review their own policies with the goal to "reduce administrative burdens while reducing the risk of waste, fraud and abuse." As we start this daunting task, who is at the table and what should they be working on? How can we take advantage of new flexibilities, yet maintain some of the old (or new) administrative burdens? How do we get the word out? This session will share some experiences and strategies for developing and disseminating policies. Bring your ideas on how we can take advantage of this opportunity to improve management of sponsored projects.

Learning Objectives:

- Learn strategies for approaching policy revisions
- Understand the audit risk for administering awards during a period of policy transition
- Discuss communication plans for rolling out change

Robert Andresen, *Director of Research Financial Services, Associate Director Research and Sponsored Programs*
University of Wisconsin-Madison

2:15pm – 2:45pm **Afternoon Break**

2:45pm – 3:45pm **Tuesday Concurrent Sessions**

Alike But Not the Same: Understanding the Unique Role of Center Research Administrators

Pre-Award Research Administration, Basic/Intermediate, Concurrent Session

At a glance, research administration in a center setting may look just like research administration in a department. Delve deeper, however, and you'll find that centers are a different reality: centers are caught between departments and divisions, and have a unique set of considerations and issues. Join colleagues in discussing different types of centers, the unique nature of centers, and solutions for some of the most common center research administration issues.

Learning Objectives:

- Identify different types of centers and understand how their research administration needs and concerns vary
- Understand strengths and challenges inherent in center research administration
- Learn strategies for establishing processes and relationships to ensure efficient and collegial administration

Kristin Harmon*, Grant Administrator, Wisconsin Institute for Discovery, University of Wisconsin-Madison*

2:45pm – 3:45pm **Tuesday Concurrent Sessions**

International Collaboration: Scientists Do It, Can Research Administrators Do It, Too?

International, Basic, Concurrent Session

PIs will often engage in scientific collaborations with colleagues in other countries. Sponsors reward effective research collaborations with funding. There is usually little regard to the administrative challenges, and there are many. Those of us in sponsored research are faced with identifying an administrative counterpart, navigating an unfamiliar administration structure, overcoming language barriers, unfamiliar terms, currency conversion and a myriad of other challenges. Join colleagues for a lively discussion about trust, risk, control, and favorable outcomes.

Learning Objectives:

- Learn where to start when informed of an international collaboration
- Identify strategies to help identify your counterpart at the collaborating institution
- Understand various organizational structures, communication lines, and variables that you may encounter

David Lynch, *Executive Director, Office for Sponsored Research, Northwestern University*
Tom Wilson, Assistant Vice President, University College of Health Sciences, Rush University Medical Center

Change Management in Research Administration

Financial Research Administration, Advanced, Case Study

Change is inevitable, but it doesn't have to be abominable. Using case studies, we will discuss some of the major challenges with transitions and project management, and how to effectively hurdle obstacles and barriers to progress. Examples and techniques will be shared based on our pitfalls and accomplishments. This session is geared to research administrators with 5+ years of experience who have faced, or who are facing, growing pains within their institutions. Join us for a lively talk on managing the change of change management.

Learning Objectives

- Recognize the changes occurring in your unit within the broader institutional context
- Develop the necessary adjustments to meet your institution's needs
- Identify the appropriate tools to effectively begin to ease the transitions occurring within your institution

Trisha Simmons, *Grants and Contract Accountant, Southern Illinois University Edwardsville*
Tricia Callahan, *Director Proposal Development, Miami University*

Managing Faculty Appointments at Academic Medical Centers

Medical/Departmental Research Administration, Intermediate, Concurrent Session

Many differences and complexities exist in the administration of research programs in a clinical setting compared with a traditional university. This session will explore some of these differences and expand on issues related to academic medical centers and clinically based research programs. Topics include appointment letters, the definition of institutional base salary, clinical practice plans, affiliated vs. non-affiliated hospitals, effort, distinguishing between clinical effort and clinical trial effort, how to manage effort commitments on K Awards, VA appointments, and Medicare time reporting.

Learning Objectives:

- Understand compensation and effort reporting requirements in academic medical centers and clinical-based programs
- Articulate federal guidance that governs faculty appointments at academic medical centers with a focus on guidance applicable to University VA joint appointments and how this is implemented at research institutions
- Assist hospital and clinically based administrators to better understand the administrative and regulatory environments

Jamie Caldwell, *Director, Office of Research Services, Loyola University Chicago Health Sciences Campus*

2:45pm – 3:45pm **Tuesday Concurrent Sessions**

Other Duties as Assigned

Primarily Undergraduate Institute, Basic, Discussion Group

Grants officers and administrators at primarily undergraduate institutions (PUIs) or in small offices often have a unique vantage point that allows us to see connections among different activities or institutional priorities. Working with a variety of faculty, staff, and administrators or pulling together cross-functional teams to generate new ideas can be exciting—and a bit like herding cats. Whether you work primarily with faculty developing research applications, you work out of an Advancement Office seeking grants for institutional priorities, or you “do it all,” we will share our tips and welcome your questions, observations, and experiences on the “other duties as assigned” that crop up as part of your daily job.

Learning Objectives:

- Balancing the different “hats” a grants professional wears
- Saying “yes” and “no” to requests for assistance beyond typical grant duties
- Getting what information you need without ruffling (too many) feathers

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Kelly Ball-Stahl, *Senior Grant Specialist, Northeast Wisconsin Technical College*
Roger Wareham*, Director, Grants Development Office, University of Minnesota-Morris*

Site Visits – The Ecstasy and the Agony

Special Topics, Intermediate, Concurrent Session

Notification of an impending site visit sends a wave of excitement through a team of proposers, but it can quickly turn to fear when they realize everything needed to prepare for the visit. We will review how organizations can help faculty prepare for the big event, focusing on taking the logistic details off their hands so they can concentrate on presenting the science and rallying the team. The session will share some of Purdue’s past experiences and lessons learned from site visits.

Learning Objectives:

- Learn techniques for effectively managing details related to site visits
- Identify ways to avoid potential pitfalls based on “lessons learned” scenario

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Susan Grimes, *Assistant Director, Purdue University*
Kristyn Jewell, *Funding Specialist, Purdue University*

3:45pm – 4:00pm **Afternoon Break**

4:00pm – 5:00pm **Concurrent Sessions**

From Data Sharing to Data Stewardship

Compliance, Basic, Concurrent Session

Agencies such as the NSF and NIH require data management plans as part of research proposals, and the Office of Science and Technology Policy (OSTP) is requiring federal agencies to develop plans to increase public access to results of federally funded scientific research. Join us for a session on sustainable data sharing models, including models for sharing restricted-use data. Demos of these models and tips for accessing public data access services will be provided as well as resources for creating data management plans for grant applications.

Learning Objectives:

- Keen understanding of several sustainable data management/sharing models
- Ability to critique data sharing products/services
- Knowledge of resources for creating data management plans for grant applications

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Linda Detterman, *Assistant Director Collection Delivery, ICPSR, University of Michigan*
Amy Pienta, PhD, *Director of Acquisitions, ICPSR, University of Michigan*

4:00pm – 5:00pm **Concurrent Sessions**

The Logistics of Developing Complex, Multi-Project Proposals

Pre-Award Research Administration, Basic, Case Study

Helping faculty develop complex, multi-project proposals such as NIH P30s and U54s presents special challenges, ranging from editing large numbers of biographical sketches to fostering a common research vision among investigators. We will discuss some logistical strategies for promoting faculty collaborations, applying organizing procedures to ensure timely submissions, editing scientific and non-scientific text, and working through institutional systems.

Learning Objectives:

- How to organize investigators into a cohesive team with a common research vision and a uniform set of priorities
- How to ensure timely submission with minimal last-minute chaos
- How to ensure the best possible proposal is submitted to the funding agency

Steven B. Chin*, Associate Proposal Development Manager, Office of the Vice Chancellor for Research*
Indiana University-Purdue University Indianapolis
Julia L. Angstmann, *Proposal Writer/Editor, Office of the Vice Chancellor for Research,*
Indiana University-Purdue University Indianapolis

Navigating Personnel Agreements with the VA

Human Capital, Overview, Discussion

Do your faculty interact with the VA system? Do you anticipate your faculty will interact with the VA system in the future? Have you had "issues" involving faculty or staff shared with the VA? If you answered yes to any of these, or if you're just curious, this is a good session for you. It gives you the chance to learn a little to help make things better, or perhaps learn enough to make you want to run in the other direction. Either way, it's a unique opportunity to interact with a VA administrator and a university administrator who have made this work. Well, at least as much as a two organizations with their own complex policies, procedures, and laws can. If you have interacted with the VA, come prepared to share.

Jim Maus, *Senior Research Administrator, Washington University St. Louis*
Tracey Arensmann*, Budget Analyst Research Services, VA St. Louis Health Care System*

Managing Change in the Central Pre-Award Office: Optimizing Subcontracting

Pre-Award Research Administration, Advanced, Concurrent Session

Central pre-award offices can oversee a range of sponsored program business functions that compete for resources. While submitting proposals may be the prevalent business function of a pre-award office, the "post-award" functions of such an office—which can include agreement negotiation, award establishment, and/or subcontracting—must also be optimized. This session will walk the audience through a case study in change management, in which a pre-award office entirely re-engineers its subcontracting function. The session will review organizational structure, human resources, policies, systems, metrics and relationships as tools for change management.

Learning Objectives:

- Learn the characteristics of organizations that successfully manage change
- Identify the tools available to manage change in an organization
- Learn how to evaluate the subcontracting function of a pre-award office

Tyra Darville-Layne*, Senior Grant & Contract Officer, OSR Evanston, Northwestern University*
Elizabeth H. Adams*, Executive Director, OSR Evanston, Northwestern University*

4:00pm – 5:00pm **Concurrent Sessions**

Keys to Successfully Developing and Managing Recharge Centers
Financial Research Administration, Intermediate, Concurrent Session

Recharge centers are revenue-generating university enterprises that provide goods and/or services of a specialized nature to other departments within the university. Units that are set up as recharge centers are designed to recover the costs of their operations primarily through charges to internal users. This session will discuss the steps in developing a recharge center in a university setting and the tools to effectively manage them.

Learning Objectives:
- Identify the tools or practices for best management
- Learn how to set up a new recharge center
- Learn how to develop the rate(s) for your recharge center

Thongsy Singvongsa, *Research Administrator, Northwestern University*
Nicole Nichols*, Research Administrator, Washington University*

A Revenue Opportunity: Introduction to the Short Form F&A Cost Rate Proposal
Financial Research Administration, Intermediate, Concurrent Session

In an era of diminished resources, colleges and universities must explore alternative revenue sources. In many cases, however, they are not recouping indirect expenses because they don't have a federal indirect rate agreement. This session will review the Short Form Method for preparing the Facilities & Administrative Cost Rate proposal. Topics include data collection, preparing a defensible F&A Cost Rate proposal, A-133 compliance issues, common target areas during F&A rate negotiations, and choosing the right base for your rate

Learning Objectives:
- Learn how a federal F&A Cost Rate agreement can recoup indirect expenses for grant awards
- Learn how the F&A Cost Rate proposal comes together and what to expect when interacting with your institution's cognizant auditing agency

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Jeffrey Gossrow*, Manager, MAXIMUS Higher Education Practice*
Mitzi Singleton*, Manager, MAXIMUS Higher Education Practice*

Cost-Sharing Challenges
Special Topics, Intermediate, Concurrent Session

Cost-sharing represents an administratively complex and high-risk business objective. This session will discuss many elements of cost-sharing with a focus on post-award administration. We'll explore more basic concepts such as what constitutes cost-sharing at the proposal stage and the federal policies and guidelines related to cost-sharing, and then discuss the challenges and approaches related to tracking and funding cost-share commitments, effectively using enterprise management systems to help where possible, and the institutional impacts of cost-sharing. A recent institutional change in the way Northwestern University manages post-award cost-sharing tracking (including evaluation, design, and implementation) will also be presented.

Learning Objectives
- Identify what constitutes cost-sharing and the different forms of acceptable and unacceptable cost-sharing
- Understand the various impacts cost-sharing has on an institution
- Understand the challenges and considerations when determining how to monitor and track committed cost-sharing

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Kelly Morrison, *Associate Director, Office for Sponsored Research, Northwestern University*

6:00pm – 10:00pm **Tuesday Night Event**

Join us for a fun-filled event, complete with food and beverage fixings to whet your appetite for racing with your colleagues (join us to see it!). Dance the night away to tunes like "Dead Man's Curve," "Hot Rod Lincoln," "409," or one of your choice!

9:00pm – Midnight **Hospitality Suite**

Located in the Colorado Room.

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.

Wednesday, April 30

7:30am – 9:00pm	**Buffet Breakfast and Business Meeting** *Come hear about the latest Region IV activities. All are welcome to attend and participate in the conversation, but only current members are invited to vote.*
9:00am – 10:30am	**Concurrent Sessions**
9:00am – 10:45am	**Get Involved! Fair**
10:30am – 10:45am	**Morning Break**
10:45am – 11:45am	**Concurrent Sessions**
11:45am	**Adjourn** *Join us at the next Spring Meeting in Chicago, April 26-29, 2015!*

Please wear your name badge to all events including workshops, concurrent sessions, and evening networking events.

Wednesday, April 30

7:30am – 9:00pm **Buffet Breakfast and Business Meeting**

9:00am – 10:30am **Concurrent Sessions**

NIH Fundamentals

Pre-Award Research Administration, Basic, Concurrent Session

Learn about everything NIH, including its history and organization. We'll explore the basics of the NIH grant process, what those terms and numbers mean, and various forms and notifications. We will also discuss resources and sponsor systems.

Learning Objectives:

- Provide the history and organization of NIH
- Show how the grant process works for NIH applications
- Explore the agency numbering system, vocabulary, specific forms, and NOA

Charlie Giese*, Research Program Manager, University of Wisconsin-Madison*
Perry M. Kirkham, PhD, *Project Coordinator, Office of the Vice President for Research, Purdue University*

NIH, its Public Access Policy, and You

Compliance, Intermediate, Concurrent Session

NIH's Public Access Policy isn't going anywhere; if anything, other federal agencies will soon be taking NIH's lead and move toward a wider public access mandate for publications stemming from grant-funded research. We will explore the NIH Public Access Policy and provide the tools to navigate compliance. We will discuss the scope and applicability of the policy, what it means for the grant process, how to deposit a publication in the NIHMS system, and how to know you're compliant.

Learning Objectives:

- Analyze the NIH Public Access Policy and understand how it applies to the grant proposal process
- Determine the applicability of the policy and how it impacts PIs on the proposal and award level
- Review the NIH Manuscript Submission portal to learn the process for attaining an NIHMS number and PMCID

Megan Todd, *Grants Specialist, The University of Kansas Center for Research*
Merle Rosenzweig*, Taubman Health Sciences Library, University of Michigan*

Managing Cost-Share in PeopleSoft

Special Topics, Advanced, Case Study

We will review the fundamentals of cost-sharing and discuss several case studies that illuminate the challenges and pitfalls associated with matching funds. We will address questions such as: What criteria might one use in agreeing to provide cost-sharing? How does one deal with in-kind contributions and third-party match? What's the difference between mandatory, voluntary-committed, and voluntary-uncommitted cost sharing? And shouldn't I be committed for even considering to provide cost-sharing?

David Schmidt, *Assistant Vice President, University of North Dakota*
Jennifer Rodis, *Policy Analyst, Research and Sponsored Programs, University of Wisconsin-Madison*

9:00am – 10:30am **Concurrent Sessions**

Keys to Risk Management in Research Administration

Financial Research Administration, Intermediate, Case Study

In our ever-changing compliance environment, two constants are the inherent risks of accepting sponsored funding and the finite resources to manage them. It can be tempting "cross your fingers and hope we don't get audited," but there is a better way. We will discuss how to assess the risks associated with sponsored funding and most efficiently deploy limited resources to mitigate them. We will build a toolbox of financial post-award risk management strategies and explore how to develop a solid foundation of internal controls, training, and communication within your unit.

Learning Objectives:

- Identify areas of risk and their potential consequences
- Understand road blocks that are preventing or could prevent your unit from managing risks better
- Implement general strategies for better risk-resource balance
- Use tools provided by your facilitators to manage risks in your units

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***Susan Held**, Senior Research Administrator, Northwestern University*
***Lori Palfalvi**, Manager of Education and Training, Northwestern University*

HR Issues Facing Research Administrators

Human Capital, Intermediate, Case Study

One would think that research administrators have to deal only with research administration issues, but that just isn't the case. We inevitably get caught up in dealing with not only our own staff but the staff of our faculty and even our faculty themselves. HR issues are draining both physically and emotionally, but in the end people are the key to our success. Join a panel of seasoned research administrators as they share interesting and challenging HR situations they have faced during their careers. They will share the hard lessons learned from the problems, as well as the joys they experienced from their success. There will be plenty of time for you to share your joys and sorrows, so come and share.

Learning Objectives:

- Understand the importance of HR in research administration
- Learn strategies for avoiding or mitigating HR problems

***David Lynch,** Executive Director, Office for Sponsored Research, Chicago Campus, Northwestern University*
***Jim Maus,** Senior Research Administrator, Division of Infectious Diseases, Washington University School of Medicine*
***Craig Reynolds,** Associate Director, Office of Research and Sponsored Projects University of Michigan*

An Overview of the Sunshine Act

Compliance, Basic, Concurrent Session

This panel discussion will present an overview of the Open Payments Act, its final rule requirements, and how the public reporting of financial interactions between industry and physicians, teaching hospitals, and colleges of medicine will affect clinical practice, research, and clinical trials. Presenters from private and public institutions will address how and whether: 1) the regulation impacts conflicts of interest in research reporting; 2) institutions provide information to industry partners; 3) institutions monitor public reports; and 4) institutions manage/dispute discrepancies.

Learning Objectives:

- Understand the major requirements of the Open Payments Act, who is affected, and what will be reported
- Understand how each institution implements the reporting, review, and dispute of public information, how it will affect physicians, and methods for educating the physicians at each institution
- Understand the potential issues that will arise and how each institution handles public requests for information and patient education, and how this new rule overlaps and impacts conflicts of interest in research

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***Suzann VanNasdale, J.D.,** COI Administrator, Compliance Manager, The Ohio State University*
***June Anne Insco**, Outside Interests & Conflict of Interest Manager, Office of Regulatory Affairs*
University of Michigan Medical School

9:00am – 10:30am **Concurrent Sessions**

Crowdfunding

Special Topics, Advanced, Concurrent Session

Crowdfunding is a recent phenomenon where many contributors pool small individual donations to support a project of common interest, such as research, films, technology, and startup companies. Many faculty have used crowdfunding to raise funds for projects outside of the usual funding channels. This form of research support raises many questions: How to deal with these “unregulated” funds? Should they be treated as grants or gifts? Should the SRO be involved at all? These questions and more will be discussed as we explore the possibilities and the pitfalls in this new territory of sponsored projects. Two institution models will be presented as examples of administering crowdfunded projects.

Learning Objectives:

- Learn the definition of crowdfunding and be introduced to models that may be useful for supporting university activity
- Understand what types of activities might be best supported through crowdfunding
- Understand the particular fundraising and compliance challenges that may arise in crowdfunded projects

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Natasha Chopp, *Research and Development Marketing Manager, Michigan Technological University*
Patience Graybill Condellone, *Pre-Award Administrator, Southern Illinois University Edwardsville*
Jerry Weinberg, *Associate Provost for Research and Dean of the Graduate School, Southern Illinois University Edwardsville*

10:30am – 10:45am **Morning Break**

10:45am – 11:45am **Concurrent Sessions**

Export Controls at Internationally Focused Campuses

International, Intermediate, Concurrent Session

How do you implement an export compliance program on a campus that has strong international connections and growing aspirations? Attend this interactive session to learn how two of your peer universities are doing it. We will explore the balance between a compliant export program and activities that can take campus faculty, staff and programs to the far reaches of the globe! Building a risk profile and communicating with campus constituents to improve compliance is a challenge, but it’s one worth taking on.

Learning Objectives:

- Become aware of the obstacles when beginning an institution-wide export compliance program at a research university that has many international relationships
- Learn tools and tactics to address those obstacles
- Apply those “lessons learned” to your own university

Jennifer May, *Director Research Compliance Services, University of Missouri-Columbia*
Lisa Palazzo, *Director of Export Control Management and Privacy Management, Case Western Reserve University*

Through the Cracks: Who Assists Faculty with Post-Award Non-Financials?

Financial Research Administration, Basic, Discussion Group

Faculty members often need assistance with progress reporting via systems like RPPR and Research.gov. Oftentimes questions regarding who assists with these reports (along with other post-award non-financial matters), who reviews, and who submits them, come to the central pre-award office, or they are directed to the post-award office or department administrators. For many institutions, the question "Who assists faculty with post-award non-financial matters?" often goes unanswered and assistance in this area falls through the cracks. If you have a good working model at your institution or want to learn how to develop a good model, please join us! Come prepared to talk, share, and brainstorm.

Learning Objectives:

- Identify where in the grant process faculty can get help with post-award and non-financial matters at your institution
- Brainstorm ideas for best practice on assisting faculty with post-award, non-financials
- Identify training sessions for research administrators to assist with post-award, non-financial matters.

Tricia Callahan, *Director Proposal Development, Miami University*

10:45am – 11:45am **Concurrent Sessions**

Analyzing Everyday Compliance Issues

Compliance, Intermediate, Discussion Group

Discussing case studies can help keep our minds nimble. We'll use case studies to examine how to handle compliance issues related to topics such as conflict of interest, safety, animal usage, and human subjects research. Come prepared to share your experiences and expertise in this interactive session.

Learning Objectives:

- Identify key compliance issues
- Practice analyzing complex situations
- Share information and knowledge

Bin Ye, *Senior Grants and Contracts Specialist, University of Wisconsin-Madison*
Jennifer Rodis, *Grants and Contracts Specialist, University of Wisconsin-Madison*

Reviewing and Negotiating Contracts

Primarily Undergraduate Institution, Basic/Intermediate, Concurrent Session

Reviewing and negotiating contracts at an undergraduate institution does not have to be a solitary accomplishment. In this session, we will cover the basics of contract negotiation and discuss problematic clauses and best practices. The presenters will share useful tools for contract review.

Dawn Underwood, *Director of Sponsored Programs, Indiana State University*
Melony Sacopulos, *J.S., L.L.M., B.S., General Counsel and Secretary of University, Indiana State University*

Lean In Post-Award

Special Topics, Intermediate, Case Study

For the past 2+ years the University of Michigan Medical School has been developing new ways of performing work under the post-award umbrella. Teams have been formed and Lean principles have been used to develop new standard work across the Medical Campus. Using Lean to improve business processes is becoming more popular in academia and in this session you will learn how to use Lean principles in your own operation to standardize and refresh how you do business.

Learning Objectives:

- Learn how to use Lean principles in your own operation
- Learn the wins that the team realized from the new process
- Understand how and why procurement is considered part of post-award

Chad LaRue, *Financial Senior Manager, Pediatrics, University of Michigan*
Emily Hamilton, *Research Director Surgery Department, University of Michigan*
Melissa Karby, *Administrative Manager Associate, University of Michigan*

Collaborative Process Improvement

Special Topics, Basic, Case Study

This session will review a pilot program at Northwestern University in which the Office for Sponsored Research collaborated with a research-intensive department and the relevant dean's office to review and improve processes in sponsored projects management. The processes related to the following major business functions: proposal submission, award setup and management, progress report submission, subcontract issuance/monitoring and cost-sharing. The pilot also undertook a roles and responsibilities assessment/audit. Find out what we learned and how we implemented the results! We'll also show you how to develop interest in such a program at your institution, with the aim of enhancing operations and improving cross-unit partnerships.

Tina Hollins, *Associate Grants Director, Northwestern University*
Michele McDonough, *Assistant Chair, Northwestern University*

Program Committee

The Region IV Program is created by a host of volunteers each year. Without their help and support this program would not be possible. With gratitude, we recognize each:

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Program Co-Chairs	Patience Graybill	*Southern Illinois University Edwardsville*
	Bonniejean Zitske	*University of Wisconsin-Madison*
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