52nd NCURA Region IV Spring Meeting

MICHIGAN

NCURA
Region IV
Spring Meeting
2024
Ann Arbor, MI

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renew

April 28th – May 1st, 2024

Ann Arbor, Michigan

2024 Spring Meeting Program Committee

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Co-Chair for Program
University of Wisconsin-Madison

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Co-Chair for Logistics
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Creighton University

Track Leaders

Conference Advisor	**Heather Offhaus**	University of Michigan
Workshop Coordinator	**Diane Hillebrand** **Michele Kennett**	University of North Dakota University of Missouri
Spark Sessions	**Sandy Fowler**	University of Wisconsin-Madison
Poster Session	**Crystal James**	Medical College of Wisconsin
Federal	**Calleen Roper**	University of Wisconsin-Madison
Compliance	**Craig David**	University of Missouri
Data Metrics and AI	**John Schwartz**	University of Cincinnati
Departmental	**Brianna Galli** **Susan Holden**	University of Michigan University of North Dakota
Human Capital	**Kelly Andringa**	University of Iowa
Post-Award/Financial	**Jennifer Foley** **Liz Grinstead**	Medical College of Wisconsin University of Chicago
Pre-Award	**Averia Flasch**	Marquette University
PUI and Research Development	**Kristel Seth** **Jodi Kuznia**	Minnesota State University-Mankato St. Cloud State University
Registration, Volunteerism, Breakfast Roundtables	**Diane Domanovics**	R&D Research Consulting Group
Conference App Coordinator	**Katie Schortgen**	The Ohio State University
Monday Night Dinner Groups Coordinator	**Julie Olivero**	University of Michigan
AV Coordinator	**Keith Kutz**	Iowa State University

Transportation

Transportation to/from Detroit Metropolitan Airport: The Kensington Hotel is about 23 miles from the Detroit Metropolitan Airport. There are several transportation options to Ann Arbor, including Charter Car Services (Golden Limousine, Metro Cars, Trinity Transportation, Premier Taxi and Limousine Service, and Tootl), Uber, Lyft, Airport taxis and AirRide.

Transportation from the Kensington Hotel to Downtown Ann Arbor: Since there are no hotels in Downtown Ann Arbor large enough to accommodate our conference, the NCURA Region IV Site Selection Committee recommended The Kensington Hotel as the option to maximize our conference experience. It is about three miles from Downtown Ann Arbor. To ensure our members get to explore the downtown area, NCURA Region IV, Destination Ann Arbor, and Golden Limousine are partnering to provide shuttles on Sunday and Monday evenings, as well as continued shuttle service from the Kensington to Revel and Roll on Tuesday evening. Shuttles are first come, first served, and there will be one 56-passenger bus available on Sunday night, two on Monday, and three on Tuesday.

Sunday, April 28: Bus shuttles will be running for attendees to explore downtown Ann Arbor. Shuttle service departs the hotel at 00:15s and 00:45s, first shuttle 5:15pm; Shuttle service departs downtown at 00:00s and 00:30s, last shuttle at 10:00pm.

Monday, April 29: Dinner Groups are scheduled at either 6:00 or 6:30pm. Please see the sign-up sheets at the registration desk and sign up by 3pm on Monday. Bus shuttles will be available to all attendees, with preference to the 6:00pm dinner group attendees for the first three shuttles of the evening. Shuttle service departs hotel at 00:15s, 00:30s, 00:45s,, and 00:00s; first shuttle at 5:15pm. Shuttle service departs downtown at 00:15s, 00:30s, 00:45s, and 00:00s; last shuttle at 10:00pm.

Tuesday, April 30: Shuttle service to our off-site event at Revel and Roll will begin at 6:40pm. Bus shuttles will depart the hotel every 10 minutes until all attendees have been picked up. Shuttles will depart Revel & Roll starting at 7:30pm, coach departing every 15 minutes.

Continuing Education Units

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.

For attendance verification, please send a list of all modules you attended to NCURA Region IV (http://www.ncuraregioniv.com/contact.html) after May 1st, 2024.

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.

CRA Review Session!

The Research Administrators Certification Council (RACC) will be holding a CRA Review session on Saturday, April 27, at the conference hotel. For more information and for registration, please see: https://www.cra-cert.org/review-sessions

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Keynote Speaker

Dr. LeShawndra Price

LeShawndra Price, PhD, Director of the Office of Research Training and Special Programs (ORTSP) at the National Institute of Allergy and Infectious Diseases (NIAID), is a leading expert in the fields of health equity, global health, and implementation science, with more than 20 years of experience at the NIH. She supports research training programs to develop the next generation of researchers and physician scientists, including promoting diversity within the biomedical research workforce, within NIAID's mission areas. Dr. Price also manages NIAID's Small Business Innovation Research and Small Business Technology Transfer programs and implements the Institute's international outreach and compliance program, including overseeing the NIAID Global Infectious Disease Research Administration Award for Low- and Middle-Income Country Institutions (G11). In partnership with academic medical centers and universities, ministries of health, NGOs, and other research institutions, Dr. Price has built collaborative research programs across multiple sectors with the aim of reducing disease in vulnerable populations and improving healthcare delivery around the world. Her work has spanned the entire lifespan from childhood to adulthood, across infectious diseases and several chronic diseases, including mental health, substance abuse, and heart, lung, and blood diseases.

Dr. Price is a dedicated certified health coach and passionate self-care advocate. With a profound belief that resilient leaders prioritize their well-being, she empowers individuals to adopt holistic approaches to life. Dr. Price is committed to guiding others in managing stress, enhancing physical fitness, and nurturing mental health. Through her expertise and compassionate guidance, she inspires individuals to incorporate self-care practices into their daily routines, promoting a balanced and fulfilling life. Driven by a mission to foster resilient leaders, she encourages the cultivation of habits that contribute to overall well-being, creating a foundation for a healthier and more vibrant existence.

The Keynote Address is sponsored by the University of Michigan Medical School Office of Research.

Conference Overview

Saturday, April 27	
8:30am – 5:00pm	Research Administrators Certification Council (RACC) Body of Knowledge Review Session – Separate Registration Required
Sunday, April 28	
7:30am – 5:00pm	Registration Desk Open
8:30am – 4:30pm	Workshops: ***See Page 8 for full details!***
12:00pm – 1:00pm	Workshop Attendee Luncheon
5:00pm – 6:00pm	Welcome Reception – ***Open to all conference attendees!***
9:00pm	Hospitality Suite
Monday, April 29	
7:30am – 5:00pm	Registration Desk & Exhibits Open
7:45am – 8:45am	Continental Breakfast & Roundtable Discussions
9:00am – 10:15am	Opening Remarks, Keynote Address, & Networking Event
10:30am – 11:45am	Concurrent and Discussion Session 1
11:45am – 1:00pm	Awards and Recognition Lunch
1:00pm – 4:30pm	Concurrent and Discussion Sessions 2 & 3
5:00pm – 6:00pm	Newcomers Reception
6:00pm	Monday Night Dinner Groups
9:00pm	Hospitality Suite
Tuesday, April 30	
7:30am – 5:00pm	Registration Desk & Exhibits Open
7:45am – 8:45am	Continental Breakfast & Roundtable Discussions
9:00am – 11:45am	Concurrent and Discussion Sessions 4 & 5
11:45pm – 1:00pm	Luncheon
1:00pm – 2:00pm	Concurrent and Discussion Session 6
2:15pm – 3:15pm	Poster Session & Spark Sessions
3:30pm – 4:30pm	Concurrent and Discussion Session 7
7:00pm – 9:30pm	Tuesday Night Event
9:00pm	Hospitality Suite
Wednesday, May 1	
7:30am – 10:00am	Registration Desk
7:45am – 9:00am	Breakfast/Region IV Business Meeting
9:15am – 12:00pm	Concurrent and Discussion Sessions 8 & 9
12:00pm	**Meeting Adjourn! Thank you & Safe Travels!**

Sunday, April 28th

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

8:30am – 4:30pm **Workshops (Morning, Afternoon, and Full-Day)**

Workshop details located on the next page.

12:00pm – 1:15pm **Workshop Attendee Luncheon**

5:00pm – 6:00pm **Welcome Reception – Open to all conference attendees!**

9:00pm **Hospitality Suite**

The Hospitality Suite is open each night, offering a place to unwind and chat with colleagues. A variety of board and card games will be available as well!

Welcome Reception

Sunday 5:00pm – 6:00pm

This year, our Welcome Reception is sponsored by InfoReady!

Please join your fellow conference attendees Sunday evening at the welcome reception to kick off the 2024 NCURA Region IV Spring Meeting!

The reception will provide a fantastic opportunity to meet or reconnect with colleagues to kick-off the conference! Join us for delectable appetizers.

Workshops

Morning Workshops: 8:30 AM – 12:00 PM
Afternoon Workshops: 1:15 PM – 4:30 PM

All workshops include lunch! (RSVP email will be sent out prior to workshop.)

Workshop Overview

WS #	Time	Title
1	Morning	Introduction to Research Administration
2	Afternoon	Pre-Award Basics
3	Afternoon	Post-Award Basics
4	Full Day	Intro and Pre-Award Basics
5	Full Day	Intro and Post-Award Basics
6	Morning	Departmental Research Administration 101
7	Afternoon	The NIH Grant Cycle: An Overview from RFA through Closeout
8	Morning	Inspire Action: Mentoring & Strategic Leadership – Leveraging Cross-Institutional Collaboration
9	Afternoon	An Introduction to Industry Contracting
10	Morning	Effective Presentations – *FREE for attendees!*

Workshop Descriptions

Workshops 1-5: Introduction to Research Administration

Description: *One body of information, five ways to learn! Pick your optimal learning track.*
WS #1 (AM only): Introduction to Research Administration
WS #2 (PM only): Pre-Award Basics
WS #3 (PM only): Post-Award Basics
WS #4 (Full-day): Intro & Pre-Award Basics
WS #5 (Full-day): Intro & Post-Award Basics

Choose your own adventure! These workshops are intended to work together to provide an introduction on what every pre-and post-award research administrator should know. Take only the morning, only the afternoon, or all day long!

Spend the morning (WS #1 - Intro) engaged in activities and discussions that address roles and responsibilities in research administration and the lifecycle of an award. Topics will include sponsor and award types, the federal costing principles, and how to navigate Uniform Guidance (2CFR200).

In the afternoon, choose your path as we split into Pre-Award and Post-Award common issues and best practices.

The Pre-Award (WS #2 - Pre) afternoon will spend time on finding funding, dissecting program announcements, assembling proposals and budgets, submitting proposals, and accepting awards.

The Post-Award (WS #3 – Post) afternoon will highlight award management, pitfalls of cost transfers, effort distributions, subcontracts, and close out.

WS #4 (Intro & Pre) and #5 (Intro & Post) are the all-day versions at a reduced price!

Learning Objectives:

Introduction to Research Administration

- Identify how their role fits into the wider research administration enterprise and supports the lifecycle of a project.
- Understand common award mechanisms and basics of federal funding principles.

Pre-Award Basics

- Develop strategies for assisting faculty with proposal and budget development.
- Identify review techniques to protect the institution and lead to a smooth project implementation.

Post-Award Basics

- Review best practices for managing funded projects from receipt to closeout.
- Identify how to interpret the requirements of a grant agreement.
- Explore the proper way to handle sub-recipient agreements and monitoring.

Skill-level: Basic

Presenters:

	**Katherine Durben**, MSW, Executive Director of the Office of Research and Sponsored Programs at Marquette University. She began her career writing proposals for a non-profit organization and now has over 25 years of research administration experience. Kathy has served in multiple roles within NCURA including Chair of Region IV. Her responsibilities include management of pre-award and post-award activities, as well as other compliance issues, such as conflicts of interest and responsible and ethical conduct of research.
	**Diane Hillebrand**, CRA, Assistant Director of Research & Sponsored Program Development at the University of North Dakota. Providing grants management for all sponsored programs. Diane has been with UND since 1994. Prior to her current position, she worked in Research Affairs at the School of Medicine & Health Sciences as the Grants Manager and other various departments, all in the research arena. Diane holds a Bachelor of Business Administration in Information Management from UND. Active in NCURA at the National and Regional level for years, currently Diane is the 2024-2025 Secretary for the NCURA National Board of Directors and is traveling workshop faculty for Department Research Administration. She was one of the PRA Co-Chairs for 2022 and is a member of the 2018 ELP Program
	**Heather Offhaus**, Director of the Grant Services Review & Analysis Office at the University of Michigan Medical School. She started her research administration career in 1994 in order to pay the rent and has grown the Medical School office from pre-award review services to include direct departmental pre-/post-award support and comprehensive enterprise analytics through research metrics. Heather has served as Region Chair, Regional Treasurer, and National Treasurer. She has also served on the Traveling Workshop Faculty for NCURA.
	**Shannon M. Sutton, MBA, CPA**, Director Sponsored Projects, Western Illinois University, is a seasoned member of NCURA. She has served as Treasurer for both NCURA and Region IV, been a member of the NCURA board, and N&LDC Chair. She is currently the chair of the Region IV Site Selection Committee, Regional & NCURA Traveling Workshop Faculty, and Peer Reviewer. Shannon's responsibilities include management of pre-award and post-award activities, as well as human and animal subject regulations.
	**Roger Wareham**, Director of the Office of Grants and Research at the University of Wisconsin-Green Bay. With 23 years in research administration, he holds an MFA in Arts Administration from Wayne State University and is a graduate of NCURA's Executive Leadership Program. Roger previously served a one-year Intergovernmental Personnel Act (IPA) assignment as a Grant Policy Specialist in the Policy Office at the National Science Foundation. He is a past Region IV Treasurer and is currently an NCURA Peer Reviewer and Region IV Chair-elect.

Workshop 6: Departmental Research Administration 101

Description: The Departmental Research Administration (DRA) workshop is specifically geared toward professionals who work at the challenging intersection of research administration within a department, unit, or center. The DRA must possess a unique skillset, as they are expected to work directly with faculty, sponsors, other institutional staff (research administrators, business service offices, human resources, etc.); have a holistic view of the entire lifecycle of award management; and generally be a first point of contact and the person who ties everything together for successful proposal submissions, award management, and closeout. An added challenge for some DRAs is that research administration may only be one aspect of their role, as they could primarily be a department administrator, financial specialist, accountant, etc. This workshop will examine the integral aspects and specialized skillsets that an effective DRA should possess in order to successfully navigate the myriad facets of research administration at the departmental level. The workshop will specifically offer:

- Broad overview of the DRA role and responsibilities
- General Best Practices for:
  - Communication
  - Proposal Development
  - Award Setup
  - Award Management
- Overview of common terms and conditions
- Discussion around compliance Issues
- Insights into effective closeout
- Resources for audit readiness

Learning Objectives:

- Clarify roles and responsibilities of the DRA and those whom they interact with
- Become familiar with the expectations of the DRA's interactions and communication with various stakeholders
- Uncover best practices for pre-award proposal preparation, setting the department up for effective and streamlined post-award management
- Develop familiarity with basic principles of cost allocations and financial compliance
- Understand the process of looking for terms and conditions and how best to implement practices for applying departmental policies and procedures surrounding them.
- Attain basic understanding of compliance concepts and general requirements for human, animal and biosafety protocols.

Skill level: Basic

Presenters:

	**Zach Smith**, Research Administrator Supervisor, CRA is an experienced Research Administrator Supervisor in the Department of Mechanical Engineering at the University of Wisconsin-Madison. He specializes in large, multi-faceted proposals and awards, complex cost-sharing and proactive commitment management. His primary interests involve systems thinking and refinement of processes and procedures via novel tool development. He enjoys detail-oriented work and maintaining holistic award perspectives. Staff Assembly representative, and a mentor with NCURA and UW's RED mentoring programs.

	**Glenda Bullock** currently serves as the Senior Director of Research Administration for the Department of Medicine at Washington University School of Medicine. Her responsibilities include the overall management of 16 divisions' research enterprise, including strategic and space planning, personnel management, and administration of all research and training grants, contracts, and federally funded clinical studies. She has and continues to serve on numerous university committees related to research administration, compliance, and training. A member of NCURA since 1993, Glenda has given numerous presentations and workshops at regional and national meetings on a variety of research administration topics. She has served on the NCURA national and regional board of directors and on several committees. Glenda currently serves as a member of the International Traveling Workshop Faculty and is an NCURA Peer Reviewer. She also received the Kevin Reed Outstanding Professional Award and the NCURA Region IV Distinguished Service Award. Glenda received NCURA's National Julia Jacobsen Distinguished Service Award in 2016.

Workshop 7: The NIH Grant Cycle: An Overview from RFA through Closeout

Description: On paper, the complete NIH grant cycle can appear to be quite daunting; however with a general understanding of the processes involved, submitting, and managing NIH grants can be fairly straightforward. In this workshop, we will review best practices for the different parts of the NIH grant cycle. We will start with a review of advanced RFAs, identify the different parts of the most common mistakes in submitting an NIH proposal, and review the just-in-time and award requirements. Now that we have our award, we will review annual reporting, subaward requirement/management for domestic and foreign subawards, and conclude with closeout. We will show our participants many resources available to them to make the NIH grant cycle a little bit easier to manage and challenge them with activities research administrators will encounter during an NIH grant cycle.

Learning Objectives:

- To develop a better understanding of the different parts of the NIH grant cycle.
- To have an opportunity to have questions answered about NIH grants.
- To learn more about new policies with the NIH, including foreign subawards, data management plans, and many more.
- To learn tips and tricks when working with difficult issues through the grant cycle.
- To identify the resources available to the research administrator for submitting and managing NIH grants.

Skill level: Intermediate

Presenter(s):

	**Bill Courtney** is Director of Research Development and Administration – Arts & Sciences; and Director, Grants Administration Integrated Network (GAIN) at Washington University in St. Louis. Bill has his BS in Chemistry from the University of Missouri. In 1996, Bill joined the staff of the Mallinckrodt Institute of Radiology as a bench chemist under Dr. Mike Welch. In 2000, he moved to the McDonnell Genome Institute, where he spent 9 years as a bench chemist, lab supervisor, and project manager. 2009 brought a change of scenery for Bill as he left the University to open a small restaurant in the Delmar Loop. Feeling the urge to return to the area of medical research, Bill returned to Washington University in 2015, this time, using both his lab and business experience in research administration.

	**Kimberly Smith** is the Senior Grants Administrator at the University of Wisconsin Milwaukee. She has extensive experience in proposal development, review, and submission, as well as subaward management, contract negotiation, and award establishment. Kim is a Certified Research Administrator (CRA) and holds a Master’s degree in Research Administration from the University of Central Florida and a Master’s Degree in Management with an emphasis in Human Resources. She is a previous NCURA Region IV MOO Mentor and previously served as a mentor for Region III's mentoring program.

Workshop 8: Inspire Action: Mentoring and Strategic Leadership – Leveraging Cross-Institutional Collaborations

Description: This workshop will train research administrative professionals to use a strengths-based approach in planning, leading, and facilitating conversations that spark innovation, collaboration, and support research engagement. As a result, participants will be more prepared to mentor, share expertise and to collaborate across Region IV institutions. This work is part of the National Science Foundation's GRANTED project titled "Building Research Infrastructure, Networks, and Knowledge (BRINK) in Emerging Research Institutions,” awarded to Lawrence Technological University, Southfield, MI, and University of South Florida, Sarasota, FL. We’re excited to share the enthusiasm and how-to of building cross-institutional collaboration with you today!

Learning Objectives:

- Participants will learn how to establish connections that advance best practices across a variety of institution types (MSI, R1, R2, PUI; public/private).
- Participants will gain a more granular knowledge of diverse research support structures while learning positive and empowering communication strategies.
- Participants will role play in use of generative inquiry techniques that help others to:
    - envision possibilities,
    - share perspectives, and
    - move towards results.
- Participants will practice and improve skills in mentoring conversations through use of positive framing and redirection techniques.

Skill level: Basic

Presenters:

	**Kathryn Wrench, MBA, CRA,** has been a devoted servant leader to higher education for over 25 years. In 2021, Kathryn lead an inaugural research office at Lawrence Technological University (LTU), a predominantly undergraduate, STEM-focused, private-comprehensive educational institution, with a strategic goal of obtaining Carnegie R2 status. Kathryn’s career includes post-award and pre-award administration, research development, and research compliance roles at Wayne State University (R1); Oakland University (R2), and as project director for the Multi-State Advanced Manufacturing Consortium. Her professional passion is evidenced in work with NCURA’s Professional Development Committee, past chair of the NCURA Compliance Collaborate Community, service on NCURA’s Financial Management Committee, and past chair of American Council of Education’s chapter at Wayne State University.

	**Sandra Justice** has extensive experience in research administration, with humble beginnings at the Center for Urban Transportation Research, followed by progressively responsible roles. Sandra served as the administrative lead for the PeopleSoft Financials implementation, a modernized enterprise business system that provided greater transparency and granular understanding of research transactions. After go-live, Sandra was invited to help build the office of research and scholarship with founding Associate Director of Research, Sandra Schneider, in the College of Arts and Sciences at USF. In 2023, Sandra was selected to serve as the inaugural Director for the USF Research Development Institute. In this role, Sandra leads initiatives to advance and build the research enterprise at USF, including the Summer Writing Workshop.

Workshop 9: An Introduction to Industry Contracting

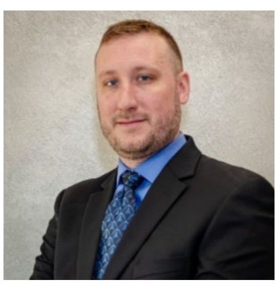
Description: With continued budget pressures across universities, researchers are looking for alternative funding streams to support their research, with a consistent eye toward industry as a key partner. This workshop will provide participants with an overview of philosophical differences that exist between universities and industry, touching on common sticking points when negotiating agreements. Workshop participants will explore the ideological differences on the sharing of research results, as well as how differences between universities and industry may manifest in different agreements. Participants will also look at some key agreement terms, reflecting on what they mean and ways to approach.

Learning Objectives:

- Participants will learn the different viewpoints that universities and industry take regarding research.
- Participants will understand how different agreement types impact the acceptability of the terms and conditions of an agreement.
- Participants will be able to recognize common contractual clauses and how universities approach them.

Skill level: Basic

Presenters:

	**Robert Gratzl** is the Assistant Director of Contracts at RSP. He joined the University of Wisconsin-Madison in 2011 as a Grant and Contract Specialist for the RSP Contracts Team. He and his staff on the RSP Contracts Team negotiate and execute agreements and subagreements for sponsored research with a variety of sponsors, including federal, non-profit, for-profit, and academic partners. Bob has presented at both regional and national NCURA meetings on a wide range of research topics.
	**Ben Tiller** is the University of Wisconsin School of Medicine and Public Health's Director of Contracts. Ben joined UW in early 2020. He represents the school in a wide range of contractual, research, and compliance matters. He spent the previous decade practicing law in Montana, where he represented public and private clients in proceedings before various state, federal, and administrative tribunals.

Workshop 10: Effective Presentations

Description: Calling all Research Administrators: Get ready for your next presentation at an NCURA event or your next staff meeting! Strong presentation skills are essential to your success as a research administrator. Whether you are presenting to 10 people or 100 people, building an effective presentation begins long before you take the stage. Assessment, preparation, and planning are essential if you want to design an engaging presentation. Join us for a hands-on, interactive session where you will obtain tools and learn strategies to increase the effectiveness of your next presentation. We will also explore communication and self-awareness practices to use when you are in front of an audience to enhance both in-person and virtual presentations.

Learning Objectives:

- Discuss the unique needs of adult learners.
- Write strong learning objectives for an effective presentation.
- Apply simple techniques to create a participant-centered presentation.
- Identify your own strengths and areas for improvement as presenters.

Skill level.: Basic

Presenters:

	**Diane Hillebrand** is the Assistant Director of Research & Sponsored Program Development at the University of North Dakota. She provides grants management for all sponsored programs. Diane has been with the University of North Dakota since 1994. Prior to joining Research & Sponsored Program Development, she worked in Research Affairs at the School of Medicine & Health Sciences as the Grants Manager and other various departments all in the research arena. Diane holds a Bachelor of Business Administration with a major in Information Management from UND. Diane has been active in NCURA activities at the national and regional level for years. Currently, she is the Secretary for the NCURA National Board of Directors for 2024-2025 and is traveling workshop faculty for Department Research Administration. Recently, she was one of the PRA co-chairs for 2022. Diane is a member of the 2018 ELP Program and also holds her CRA.
	**Jim Maus** is a Senior Grants Specialist in the Department of Neuroscience at Washington University in St. Louis. He provides cradle to grave research administration support to the faculty of the department. Jim began his career at Washington University in the Office of Sponsored Projects Accounting in 1985. Since that time, he has remained at Washington University in various roles, including positions in both basic science and clinical departments, as well as a large research institute. Jim holds a Bachelor of Business Administration with emphasis in Accounting from UMSL and his CRA. Jim has been active in NCURA activities, including numerous presentations at national and regional meetings and is a Past Chair of Region IV. He is currently enjoying reduced NCURA responsibilities in preparation for retirement!

Monday, April 29th

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

7:45am – 8:45am: Continental Breakfast & Roundtable Discussions

Join our amazing members in discussion on various topics vital to research administrators! Tentative topics include:

- Best Practices for Working Remotely. Discussion lead: Joni Bradford, Post-Award Research Specialist, University of Chicago
- Let's Talk Training Grants. Discussion lead: Glenda Bullock, Senior Director of Research Administration, Department of Medicine, Washington University in St. Louis
- Best Practices for Sharing Collaborative Proposal Documents between PIs, External Partners, and Administrators. Discussion lead: Averia Flasch, Associate Director, Project Planning and Development, Marquette University
- Volunteering Our Knowledge and Expertise to Community-Based Organizations. Discussion lead: Jennifer Foley, Administrator, Medical College of Wisconsin
- Working with Foundations. Discussion lead: Michele Kijeski, Post-Award Research Specialist, University of Chicago
- Fixed-Price Subawards on NIH Grants. Discussion lead: Hang McLaughlin, Grants & Contracts Manager, University of Minnesota
- Navigating International Subawards. Discussion lead: Alina Negomireanu, Senior Subaward Officer, University of Chicago
- Stepping Up: Transitioning to Your First Leadership Role as a Young Professional. Discussion lead: Joey Oosterman, Sponsored Research Administrator II, Van Andel Institute
- Administrative Collaborations: Working Across Offices to Address Issues such as Section 117 Reporting, Data Management & Sharing, Cybersecurity, etc. Discussion lead: Jennifer Rodis, Policy and Planning Analyst, University of Wisconsin – Madison
- Being charged to increase funding without increased resources: Can't do more, so how do we do it differently…and communicate a realistic approach for those expectations? Discussion lead: Kristel Seth, Director, Research and Sponsored Programs, Minnesota State University, Mankato
- Participant Support Costs. Discussion lead: Jenny Yuan, Finance and Grant Administration Manager, University of Wisconsin – Madison

9:00am – 10:15am: Opening Remarks, Keynote Speaker, and Networking Event

10:30am – 11:45am: Monday Morning Session

An Invitation to Effective Post-Award Management

Track: **Post-Award** – Level: **Intermediate** – Type: **Concurrent Session**

Starting a project off on the right foot with the right expectations and guidance available for the team and the PI is ideal. In this session, we will walk through the steps for effective award activation to help the PI succeed, support a strong working relationship with all members of the team supporting the administration of the project, as well, and set up the PI and team for successfully navigating the project, even through unexpected challenges.

Learning Objectives:

- Learn how to communicate effectively with the PI and the supporting administration team.
- Learn tips for onboarding your PI and administration team.
- Understand the importance of roles and responsibilities.
- Understand how to better manage challenging projects.
- Enhance resources for successful outcomes in a project life cycle.

Marie Fricano – Grant Accountant, University of Wisconsin-Milwaukee
Louise White – Grant Accountant, University of Wisconsin-Milwaukee

Research Administration in Pop Culture

Track: **Departmental** – Level: **Intermediate** – Type: **Concurrent Session**

Tony Stark promises research funding to an auditorium full of MIT students in Captain America: Civil War. Howard Wolowitz sneaks a date into his research lab so she can remotely drive the Mars Rover in The Big Bang Theory. A government agency captures a humanoid amphibian and begins to conduct studies on it in The Shape of Water. Movies and television often depict research in various forms, but rarely consider the underlying compliance and administrative requirements that research administrators manage daily. This session will use a selection of pop media clips as case studies to encourage a dialogue exploring what sort of implications these situations would have for a research administration team.

Learning Objectives:

- Understand the role research administrators play in regulating contractual, ethical, and compliance issues behind the scenes.

Michele Kijeski – Post-Award Research Specialist, The University of Chicago
Joni Bradford – Post-Award Research Specialist, The University of Chicago

Grant Growth Strategies: How to Assist Faculty Who Are Balancing Teaching and Research

Track: **PUI & Research Development** Level: **Intermediate** Type: **Concurrent**

We will discuss a variety of ways to manage grant growth strategies: 1. Working with faculty who primarily teach but want to pursue external funding; 2. Building faculty buy-in for submitting grants; 3. Managing a multifaceted workload, a variety of proposals from across colleges/departments/and levels of expertise; and 4. Supporting humanities who have a scholarship agenda and fewer funding sources. We will also discuss planning, implementing, and evaluating plans/projects within the PUI research administration office and non-PUI administration offices. We will dialogue regarding resources (or lack thereof) that we and others have found beneficial to support our work and the work of faculty scholars across the institution. We seek to contribute to the discussion about what has worked at our institutions and get feedback about what has worked best for you and your institution(s).

Learning Objectives:

- Learn about types of discussions to have with faculty members who teach and want to begin or continue their research career at an institution, along with when and how to have them.
- Understand where and how to seek funding for those faculty who are just getting started.
- Understand various growth strategies for the office, both those that work and do not.
- Share tips for evaluating growth strategies for sponsored programs/grant offices.

Kristin-Ann Beck – Industry Specialist, Mayo Clinic Rochester
Regina Matheson – Associate Vice President Academic Grants & Sponsored Programs, St. Ambrose University

NSF Proposal and Award Policy Update

Track: **Overview** – Level: **Basic** – Type: **Concurrent Session**

This session will cover revisions to the *NSF Proposal and Award Policies and Procedures Guide (PAPPG)* and other policy and system-related updates.

Learning Objectives:

- Participants will learn and be able to ask questions about NSF proposal and award policies and procedures, agency priorities, and system-related updates.

Jeremy Leffler – Outreach Specialist, Policy Office, Division of Institution and Award Support

Artificial Intelligence 101 (Research Administration Edition)

Track: **Data Metrics & AI** – Level: **Basic** – Type: **Concurrent**

Dive into the world of artificial intelligence (AI) in this presentation, designed specifically for research administrators. This talk aims to demystify AI and showcase its potential to streamline and enhance the efficiency of daily administrative tasks. We'll explore fundamental AI concepts and practical applications in a non-technical, easy-to-understand manner. Attendees will learn how AI can automate routine tasks, aid in data analysis, and support decision-making processes in research administration. Whether you're new to AI or looking to deepen your understanding, this presentation will provide valuable insights into how AI can be a transformative tool in your work environment.

Learning Objectives:

- Learn various research administration tasks that are ripe for AI help.
- Learn the AI tool landscape.
- Understand how far AI tools have come and what we can expect in the next 6 months.
- Understand privacy, legal, and ethical concerns.

Dan Harmon – Director, Data and Systems, University of Illinois at Urbana Champaign

Moving to the Dark Side (not really), Transitioning from Post-Award to Pre-Award Stories and Lessons Learned

Track: **Pre-Award** – Level: **Basic** – Type: **Discussion Session**

This session will provide a space for post-award administrators to explore a transition to proposal development. Participants will share essential knowledge, valuable resources, and practical tips to guide your journey to the proposal side.

Sandy Fowler – Assistant Dean for Research, University of Wisconsin-Madison
Averia Flasch – Associate Director Project Planning and Development, Marquette University

11:45am – 1:00pm: Awards and Recognition Lunch
1:00pm – 2:00pm: Monday Afternoon Session

Demystifying T32 Data Tables: How to Prepare for T32 Submissions Without Losing Your Cool

Track: **Pre-Award** – Level: **Overview** – Type: **Concurrent Session**

Overview of the data tables required for different types of T32 submissions, guidance on where to find the necessary information, and tricks for staying organized and sane while collecting the data for the tables.

Learning Objectives:

- Learn about the tables required for different types of T32 submissions (short term training, new application, renewal/resubmission application).
- Explore ways to find the necessary data for the tables.
- Discuss how to stay organized during the process.

Sara Seton – Research Trainer and Fellowship Manager, University of Wisconsin-Madison
Carrie Jorgensen – Research Specialist, University of Wisconsin-Madison

Federal vs Non-Federal Post Award Management

Track: **Post-Award** – Level: **Intermediate** – Type: **Concurrent Session**

This session examines the administrative and financial similarities and differences between federal and non-federal sponsored projects. Participants will review key element of example award documents to understand responsibilities and requirements for awards.

Learning Objectives:

- Review key elements in an award document.
- Learn Uniform Guidance applicability.
- Understand how to prevent delays in award setup and reconciliation stages.
- Understand administrative, reporting, and closeout requirement differences.
- Learn financial and subcontracting considerations between award types.

Angie Johnson – Interim Assistant Director, University of Wisconsin Madison
Jennifer Foley – Administrator, The Medical College of Wisconsin

Hitting the Reset Button: when International Engagements Go Awry

Track: **Departmental** – Level: **Senior** – Type: **Concurrent Session**

Using case studies and their first-hand experience with things that may (or may not!) have gone awry, the presenters will discuss some field-tested approaches and tools for (1) helping raise faculty awareness when engaging in international collaborations, and (2) helping departments/institutions stay on the right side of the federal rules and regulations related to research security. These case studies and lessons learned will serve as a springboard for conversation on the latest developments in federal guidance.

Learning Objectives:

- Identify best practices for managing risk related to international engagements.
- Identify tools to promote positive communications, planning, and outcomes for faculty.
- Hear insights related to upcoming changes in federal guidance related to research security.

Jeff Richardson – Director of Sponsored Research, Van Andel Institute
Heather Offhaus – Director of the Grant Review & Analysis Office, University of Michigan Medical School
Craig Reynolds – Vice President for Research Protections, Van Andel Institute

Creating and Sustaining Training for Your Institution

Track: **PUI & Research Development** – Level: **Intermediate** – Type: **Concurrent Session**

This session is a variation on the presentation "Creating a Training Program to Fit Your Institution" from the 2023 NCURA Annual Conference. Presenters will examine real-life case studies of plans vs. reality in building and maintaining training programs at two different R1 institutions. Wondering how to start a training initiative? Struggling to keep your training relevant? Feeling overwhelmed trying to solve Big Problems with limited resources? This session will help you address such questions and return to your institution with actionable ideas.

Learning Objectives:

- Determine realistic training goals and deliverables given your institution's needs and available resources.
- Strategically build infrastructure to promote longevity of training resources while also maintaining flexibility to respond to shifting needs and priorities.
- Find a sustainable balance between development of new training and upkeep of existing training.

Melissa Mizwa – Assistant Director, Northwestern University
Lia Floreno – Training Specialist Lead, University of Michigan

Identity-First in Research Administration: Contextualizing the "Dis" in DEI

Track: **Human Capital** – Level: **Intermediate** – Type: **Concurrent Session**

Webster's Dictionary tells it all when it defines "dis" as a prefix meaning "do the opposite of"; "deprived of (a specific quality, rank, or object)"; "exclude or expel from"; "opposite or absence of"; and "not." Whether visible or invisible, one in every four adults in the U.S. has some type of "dis"-ability. Research administrators have an excellent opportunity to gain a better understanding of the dimensions of disability and maximize inclusion efforts in their professional practices, workplace, and the wider community. This presentation will include experiential learning combined with proper etiquette for identity-first DEI for persons with disabilities.

Learning Objectives:

- Participants will learn the history of disability rights in the U.S., define disability, and identify personal, workplace, and public health challenges associated with living with a disability.
- Participants will build the capacity to put a person's identity first before their disability by learning ways to communicate in an open and honest manner about differences, through using respectful disability language, and by practicing different forms of disability etiquette.
- Through roleplaying scenarios and reflection, participants will gain awareness of and practice empathy for the challenges and differences in the lived experience for people with a disability.
- Participants will be able to articulate how disability awareness and DEI relate to their professional practice as research administrators.

Anne Kissack – Proposal Development Administrator, University of Wisconsin-Milwaukee

What Exactly Are We Doing Here??? Determining the Purpose of Sponsored Agreements and the Impact on the Single Audit and HERD Survey

Track: **Compliance** – Level: **Intermediate** – Type: **Discussion Session**

How do we determine if a sponsored agreement is Research, Instruction, or Public Service (Other Sponsored Activities)? Who makes the determination? What is the impact on F&A recovery? Are there competing priorities that can impact the decision? How is the HERD impacted? What about the SEFA (Schedule of Expenditures for Federal Awards)? What are the compliance risks of incorrectly categorizing the expenditures? Join us for a discussion on how to navigate reporting expenditures for sponsored agreements.

Craig David – Director of Sponsored Programs, University of Missouri

Hannah Brune – Associate Director Pre-Award, University of Missouri

2:15pm – 3:15pm: Monday Afternoon Session

Working Together to Manage Awards with Participant Support Costs

Track: **Departmental** – Level: **Intermediate** – Type: **Concurrent Session**

Participant support costs (PSC) come with special rules regarding how they may be used. In this concurrent session, we will examine the nuances of managing Participant Support Costs for departmental, divisional, and central office research Administrators at one institution. Topics covered may include: learning about issues managing participant support costs after they have been awarded, including what to look out for in the solicitation and budget. We will discuss potential changes, such as working with your PI to re-budget participant support costs and the importance of understanding your institution's processes and the roles research administrators may play, and more. The discussion portion of this session will play an important role in the session, as we discuss questions, concerns, and experiences amongst our different institutions.

Learning Objectives:

- Gain an understanding of participant support costs and their complexities.
- Review key concepts about post-award management of participant support costs.
- Identify opportunities for changes to effect to better support adherence to PSC terms and conditions.

Jenny Yuan – Finance and Grant Administrator Manager, University of Wisconsin-Madison

Jennifer Rodis – Policy and Planning Analyst, University of Wisconsin-Madison

Navigating the Budget: Don't be Afraid -- Embrace the Experience!

Track: **PUI & Research Development**– Level: **Basic** – Type: **Concurrent Session**

Sponsors appreciate transparency and seeing the big picture, and your project budget should give them enough information to understand what you're trying to do. With millions of grants being submitted each year, you can increase your chance of getting your share by including fully developed grant budgets that tell the story of your grant in numbers. In this session, we will review basic concepts and best practices of sponsored project budget development, with an emphasis on proposing budgets that follow sponsor, program, and applicant regulations, being mindful of the pitfalls that may be encountered (like leaving out things that are discussed in the narrative and not making the budget match!) and how to avoid them. Sometimes there are unique nuances related to budgeting fringe benefits, indirect costs, and other matters that can be different at PUIs than research-intensives.

Learning Objectives:

- Categorize project costs in a way that makes sense and is realistic.
- Understand factors determining appropriate indirect cost and fringe benefits rates applied to a project.
- Craft compelling budget narratives.
- Create your own "watch" list of pitfalls.

Roger Wareham – Director of Grants and Research, University of Wisconsin-Green Bay

Breanna Ludwig – Associate Director and IACUC Administrator, St Cloud State University

The Ins and Outs of Working with NIH: Your Questions Answered

Track: **Federal** – Level: **Basic** – Type: **Concurrent Session**

Join our Keynote Speaker for an interactive talk that will focus on working with NIH pre- and post-award, with a focus on optimizing interactions with the NIH extramural team. Hear about best ways to engage program officials, grants management staff, and scientific reviewers. The session will incorporate NIH policy updates and initiatives. You are encouraged to bring questions to address all you have ever wondered about behind the scenes at NIH.

Learning Objectives:

- Explore when and how to engage with NIH.
- Be familiar with current NIH Initiatives.

Dr. LeShawndra Price – Director, Office of Research Training & Special Programs, Division of Extramural Activities, National Institute of Allergy and Infectious Diseases (NIAID)

Heather Offhaus – Director, Grants Services & Analysis, University of Michigan Medical School

Export Controls: Beyond the Export Control Office

Track: **Compliance** – Level: **Overview** – Type: **Concurrent Session**

Given the many changing requirements, this session will discuss how the sponsored project office can work most effectively and efficiently with the export control office. We will address when you should include the export control officer and provide tips and best practices to maximize this relationship.

Learning Objectives:

- Understand why the sponsored project office should work closely with the export control office.
- Describe when to include the export control officer.
- Discuss best practices to maximize the relationship with the export control office and maintain efficiency.

Michele Kennett – Associate Vice Chancellor for Research, University of Missouri

Sonia Chawla – Assistant Vice President for Academic Research & Regulatory Compliance, Eastern Michigan University

Student Power: Unleashing the Potential of Graduate Assistants

Track: **Human Capital** – Level: **Intermediate**– Type: **Concurrent Session**

In this session, we will discuss how to leverage graduate student talent in different phases of research administration/proposal development by utilizing their individual knowledge, expertise, and interests to lighten your workload. We will provide an overview of our staffing model and specific examples of student roles in research administration.

Learning Objectives:

- Understand graduate assistants' individual strengths and benefits of utilizing them in research administration/research development and gain a student-centered perspective to this work.
- Understand how to assign tasks to graduate students based on their individual interests and experiences.
- Engage in an activity that shares various ways to staff and assign students to projects.

Emma DenBleyker – Research Associate, University of Cincinnati

Emily Bacon – Research Associate, University of Cincinnati

You’ve Submitted the FFR, Now What? Complete Project Closeout Tips and Best Practices

Track: **Post-Award** – Level: **Intermediate** – Type: **Discussion Session**

All good things must come to an end. The award is done, the FFR has been submitted, and all’s well that ends well. Or is it? Oftentimes, the grant closeout process can be more complex than we might imagine. Has the PI submitted the final technical report? Have all deliverables been met? Are there property or invention items to consider? Join us as we share tips and explore best practices for ensuring a clean closeout for any award.

Michele Kijeski – Post-Award Research Specialist, The University of Chicago

Matty Spragens – Post-Award Research Manager, The University of Chicago

3:30pm – 4:30pm: Monday Afternoon Session

Recipe for Success: Onboarding New Research Administrators

Track: **Pre-Award** – Level: **Intermediate** – Type: **Concurrent Session**

This session will discuss some methods and tools used to onboard personnel new to research administration. We will provide onboarding tools, templates, and training we use at Washington University that you can use at your institution as you onboard new research administration personnel.

Learning Objectives:

- Receive tools and methods for onboarding new personnel.
- Learn strategies to help new personnel navigate their new roles.
- Review internal Washington University programs as templates for your institution.

JoAnn Urban – Grant and Accounts Specialist, Washington University in St. Louis

Nick Savage – Grant and Accounts Specialist, Washington University in St. Louis

Post Award Snakes and Ladders: Don’t Get Bit!

Track: **Post-Award** – Level: **Intermediate** – Type: **Concurrent Session**

An interactive session designed to immerse teams in the dynamic post-award landscape of research grants. Through real-life scenarios and collaborative problem-solving, participants will delve into the complexities of managing post award. Come ready to compete, strategize, and share insights while honing your skills in handling post-award challenges effectively.

Learning Objectives:

- Adjusting budget to align with awarded amounts.
- Reconciling monthly expenses and crafting financial reports that are easy to understand.
- Monitoring cost-sharing requirements effectively.
- Achieving a successful project closeout.
- Utilizing data warehouse queries to answer any post-award inquiries.

Rula Karapatsakis – Finance Manager, University of Michigan

Effective Monitoring of Policies and Procedures at PUIs

Track: **PUI & Research Development** Level: **Intermediate** Type: **Concurrent Session**

If there is one thing we want to do better as research administrators at PUIs, it's figuring out how to work within our unique framework to maximize the effectiveness of our policies and procedures. Have you changed your effort reporting policy or internal control procedures in light of the flexibility provided by the Uniform Guidance? Have you implemented a system to evaluate and monitor compliance of these policies and procedures? Join us as we discuss tips to improve the overall effectiveness of implementing, enforcing, revising, and monitoring policies and procedures at Predominantly Undergraduate Institutions.

Learning Objectives:

- Identify institutional policies, procedures, and practices.
- Evaluate what belongs in policy and what belongs in procedures.
- Determine how best to communicate policy to faculty and administrators.
- Determine when outside consultants may be helpful or necessary.

Shannon Sutton – Director Sponsored Projects, Western Illinois University

Laina Stuebner – Grants and Research Program Specialist, University of Wisconsin-Green Bay

Working with Tech Transfer: Negotiating IP Clauses and the Downstream Effect

Track: **Compliance** – Level: **Intermediate** – Type: **Concurrent Session**

Have you ever looked at a sponsored research agreement and been concerned about how decisions you make today in negotiations will affect how the technology transfer office is able to turn innovations into products, companies, and licensing revenue for the University? Join a pre-award/compliance negotiator and a technology transfer manager for a discussion about the impact that certain contract language makes on the technology transfer team's ability to turn a project's innovation into a win-win for all parties involved.

Learning Objectives:

- Improve contract issue spotting and negotiation skills.
- Understand the impact of pre-award decisions on the ability of the tech transfer office to do its job most efficiently.

Chase Bunger – Research Contracts Administrator, University of Missouri

Kristin Harmon – Intellectual Property Disclosure Manager, University of Wisconsin-Madison

Light at the End of the Tunnel: 3 Years Into WorkDay

Track: **Data Metrics & AI** – Level: **Basic** – Type: **Concurrent Session**

We have all dreaded new systems in research management, they can be scary! We had the same feelings when WorkDay was introduced at our institution. Come sit in and listen about how it was implemented (from a research administration point of view), what we've learned, and some basic ways to maneuver in WorkDay. Let us get your feet wet in this system, so it isn't so scary!

Learning Objectives:

- Understand what WorkDay is, and its uses.
- Understand key concerns for WorkDay migration.
- Understand what to expect on "Go-Live" day.
- Understand the impact that WorkDay has on research administration.

Colleen Cummings – Senior Grants Specialist, Washington University School of Medicine in St. Louis

Sanela Kulelija – Research Administrator, Washington University School of Medicine in St. Louis

Imposter Syndrome in Research Administration

Track: **Human Capital** – Level: **Overview** – Type: **Discussion Session**

Imposter Syndrome (or Phenomenon) makes us feel inadequate and unworthy, even when reality says otherwise. The most knowledgeable and seasoned research administrators may experience self-doubt and insecurity in our fast-paced, ever-evolving, and deadline-intensive work. This session will explore how to identify Imposter Syndrome, how it might present within our profession, and what we can do to defend against it.

Betsy VanKlompenberg – Sponsored Research Analyst, Van Andel Institute

5:00pm – 6:00pm: Newcomers Reception

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

6:00pm: Monday Night Dinner Groups

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

9:00pm: Hospitality Suite

Tuesday, April 30th

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

7:45am – 8:45am: Continental Breakfast & Roundtable Discussions

Join our amazing members in discussion on various topics vital to research administrators! Tentative topics include:

- Departmental Communication. Discussion lead: Kelly Andringa, Research Manager, University of Iowa
- Best Practices for Sharing Collaborative Proposal Documents between PIs, External Partners, and Administrators. Discussion lead: Averia Flasch, Associate Director, Project Planning and Development, Marquette University
- Let's Talk Cost Share. Discussion lead: Sandy Fowler, Assistant Dean for Research, University of Wisconsin-Madison
- Best Practices for Managing Remote and Hybrid Teams. Discussion lead: Crystal James, Senior Finance and Grants Manager, Medical College of Wisconsin
- Other Support – Help, I'm Overcommitted! Discussion lead: Carrie Jorgensen, Research Administrative Specialist, Medical College of Wisconsin
- The Journey Continues: Entering Administration Management. Discussion lead: Melissa Karby, Associate Director for Research Administration, University of Michigan
- How to Get Involved with NCURA. Discussion lead: Jim Maus, Retiree in Training, Washington University in St. Louis
- How to Be Heard: Sharing Ideas for Effective Faculty Communications, Training, and Education!. Discussion lead: Joey Oosterman, Sponsored Research Administrator II, Van Andel Institute
- Multi-Tasking Tips and Tricks and How to Work Through the Challenges. Discussion lead: Valarie Warner, Finance and Grants Coordinator, University of Nebraska Medical Center
- Participant Support Costs. Discussion lead: Jenny Yuan, Finance and Grant Administration Manager, University of Wisconsin – Madison

9:00am – 10:15am: Tuesday Morning Session

Relationship Building Through Financial Reporting

Track: **Post-Award** – Level: **Basic** – Type: **Concurrent Session**

Building relationships and earning trust as administrative personnel with faculty members is crucial for effective collaboration and a positive work environment, particularly as it relates to financial reporting. This session will provide strategies to develop strong relationships with faculty through the post-award financial reporting process.

Learning Objectives:

- Understand the importance of the financial reporting process in building relationships with faculty.
- Provide strategies to develop effective and productive relationships with faculty in the financial reporting process.
- Provide examples of each strategy and how to implement.
- Discuss case study.

Jennifer Foley – Administrator, The Medical College of Wisconsin
Crystal James – Business Manager, The Medical College of Wisconsin

Growing Our Own: Preparing the Next Generation of Research Administrators through Focused Training and Experiences

Track: **Departmental**– Level: **Intermediate** – Type: **Concurrent Session**

The Ohio State University College of Medicine Grants Office (GMO) has experienced record growth in sponsored funding submissions and awards over the past five years. As research administration demands increase, the GMO has invested resources into the development of an associate team of entry level research administrators to address the need for well trained, experienced administrators. In addition to providing support to both the pre- and post-award teams, each associate participates in ongoing training and coaching focused on real life experiences, as well as providing the body of knowledge necessary for them to advance to other research administrative positions. By combining training and experience, each associate is gaining the skills necessary for them to succeed in both the GMO and research administration while also providing the GMO with a reliable talent pool, easing the reliance on external recruitment and the challenges that presents.

Learning Objectives:

- Understand advantages of focusing on junior staff development versus short-term need focused recruitment.
- Learn how to design and implement an effective training experience plan.
- Discover how to create qualitative tools and incorporate them into existing evaluations.
- Understand the benefits of maintaining a replenishing talent pool and incorporating the responsibility of mentorship at all levels to sustain.

Christopher Day – Manager, Grants and Contract Training, The Ohio State University

Brock Davis – Grants and Contract Management Analyst, The Ohio State University

Melanie Miller – The Ohio State University

COGR Updates

Track: **Federal** – Level: **Overview** – Type: **Concurrent Session**

COGR is an association of more than 200 major research universities, associated academic medical centers, and independent research institutes. This session will provide an overview of the major hot topics COGR is currently working on across the spectrum of research administration and research compliance related to federal policies, regulations, and current and pending legislation.

Learning Objectives:

- Learn about COGR’s priorities.
- Learn to identify areas of government activity, advocacy, and other hot topics on which COGR has been focused over the last year.

Jennifer Rodis – Policy & Planning Analyst, University of Wisconsin-Madison

Data Use Agreements: The Basics

Track: **Compliance** – Level: **Basic** – Type: **Concurrent Session**

This presentation will give an overview of the "What," "Why," and "When" for executing a data use agreement. We will also discuss details about what information should be included in the agreement and some template examples will be shared.

Learning Objectives:

- Understand what is considered data.
- Receive a basic overview of laws/regulations related to sharing data.
- Understand when a data use agreement should be used.
- Learn what information should be included in the data use agreement.
- See examples of templates, including FDP and non-FDP templates.

Michele Quick – Project Representative, University of Michigan

Eric Ward – Assistant Managing Project Representative, University of Michigan

Boosting Proficiency: Effective Approaches for Novice Research Administrators

Track: **Human Capital** – Level: **Basic** – Type: **Concurrent Session**

Embark on a transformative journey to elevate your skills and proficiency as a novice research administrator. Tailored for new research administrators seeking to strengthen their capabilities, this session will delve into key skills and strategic approaches essential for navigating the ever-changing landscape of research administration. Join us for an insightful discussion that aims to empower you on your professional journey.

Learning Objectives:

- Define the role of the research administrator.
- Identify and understand the key skills that are crucial for effective research administration.
- Recognize the dynamic nature of research administration, including its challenges and opportunities.
- Explore diverse training channels available for research administration.
- Engage in discussions during this session to ask questions, share insights and potential approaches to grant management (pre- and post-award).

Shanshan Gao – Grants & Contracts Financial Analyst, University of North Dakota-School of Medicine and Health Sciences

Valarie Warner – Finance and Grants Coordinator, University of Nebraska Medical Center, Department of Pediatrics, Child Health Research Institute (CHRI)

The Digital Double-Edged Sword: Artificial Intelligence for the Research Administrator

Track: **Data Metrics & AI** – Level: **Overview** – Type: **Discussion Session**

In today's growing technological landscape, artificial intelligence programs, such as ChatGPT, can be transformative to the work of the university research administrator. However, if misused, a research administrator may expose their university to security, ethical, and privacy vulnerabilities. This session will equip the audience with a general understanding of the basics of artificial intelligence. Participants will leave with the tools to responsibly apply artificial intelligence programs in their work as research administrators.

Kaitlyn Burress – Project Manager, Indiana University

Complex Budgets – Strategies for Success

Track: **Pre-Award** – Level: **Intermediate** – Type: **Concurrent Session**

In this session, we'll explore the details of complex budget requirements, and specifically how they inform budget creation and costing strategies at the proposal stage. This session will primarily focus on cooperative agreements where task-based budgeting is required, as well as agreements with atypical indirect cost rate calculations. This session will build on a foundational understanding of "standard" budgeting for Grants.gov type budgets (e.g., budgets with regular periods and no costs directly allocated to specific tasks) to help Research Administrators skillfully communicate complex requirements to PIs and other collaborators. Budgetary assumptions will be challenged, budget template shortcomings identified, and best practices for both crafting complex budgets and communicating needs with stakeholders will be offered. Session attendees will leave with a greater understanding of higher-level concepts, common pitfalls and how to successfully cost out complex budgets.

Learning Objectives:

- Review budget basics.
- Learn about budget issues related to periods of time, effort, indirect costs, cost share, award negotiation, and more.
- Discover budget template limitations.
- Gain insights on how to create complex budget templates.
- Understand best practices when tackling complex budgeting.
- Review roles and responsibilities for all those involved in budgeting.

Zach Smith – Research Administrator Supervisor, University of Wisconsin-Madison

Heather Johnson Schmitz – Manager of Grants and Contracts, University of Wisconsin-Eau Claire

Centralizing Post-Award? (A Conversation)

Track: **Post-Award** – Level: **Overview** – Type: **Concurrent Session**

In this session, we will share the University of Missouri's journey in initiating centralized post-award services. We will include an overview of the challenges that compelled us in this direction, the factors that informed how we developed our model, how it's going, and lessons learned. Following the presentation, we invite conversation about our process, as well as how other institutions are addressing similar challenges.

Learning Objectives:

- Understand the pros and cons of increasing research funding while maintaining current staffing levels.
- Identify strengths and weaknesses in your own institution's approach to providing post-award support.

Micah Carson – Senior Business Services Consultant, University of Missouri

Patrick Smith – Assistant Vice Chancellor for Finance and Administration, University of Missouri

Building Blocks in Research Administration

Track: **Departmental** – Level: **Basic** – Type: **Concurrent Session**

This session will provide knowledge, strategies, and tools to effectively secure and manage sponsored projects. We will discuss the bigger picture of research administration and equip departmental RAs with methods to provide excellent administrative support. Examples will cover the project lifecycle, from pre-award to post-award.

Learning Objectives:

- Discuss why research administration is important.
- Recognize the elements of research administration and the common ground between the PI, university administration, and external sponsors.
- Identify tools for research administrators.

Brianna Galli – Research Administrator, University of Michigan Medical School

Susan Holden – Grants Manager, University of North Dakota

Research Administration Career Path (RACP) Pilot Project Updates

Track: **Human Capital** – Level: **Overview** – Type: **Concurrent Session**

An overview of the Research Administration Career Path (RACP) Pilot Project will be provided.

Learning Objectives:

- Provide the progress that has been made on the RACP pilot project.
- Review infographics that have been created.
- Provide social media videos.
- Discuss survey results.
- Give best practices for student interns.

Diane Hillebrand – Associate Director, University of North Dakota

EXCEL: Working with Datasets

Track: **Data Metrics & AI** – Level: **Intermediate** – Type: **Concurrent Session**

Do you work with large data sets to analyze various data points? Do you spend hours trying to combine data and format into needed reports and information? In this session, we will review how Excel can help with streamlining data analysis and save you time! When we are done, you will know how to share comprehensive and impactful reports and information with your boss and other colleagues.

Learning Objectives:

- Review of commonly used excel functions and formulas including V and X Lookups, textsplits, concatenate, and text to columns.
- Review of pivot tables

Denis Jurca – Department Administrator, University of Iowa

Diane Domanovics – Consultant, R&D Research Consulting Group

GRANTED Explained: Expanding Equity and Access Across the Research Enterprise

Track: **Federal** – Level: **Overview** – Type: **Discussion Session**

The National Science Foundation's new funding line, GRANTED, has piqued the interest of research professionals across the country. This discussion group will include: an overview of the funding line, submission process, and merit review process. Attendees will also learn about the projects that have been awarded and what future opportunities might be available. Attendees will hear from a GRANTED PI, a member of a GRANTED post-award team, and a previous NSF reviewer.

Erica Kennedy – Associate Vice President for Research, The University of Southern Mississippi

John Schwartz – Senior Business Officer, University of Cincinnati

Liz McClure – Professor, University of Cincinnati

11:45pm – 1:00pm: Luncheon

1:00pm – 2:00pm: Tuesday Afternoon Session

Strengthening Preaward using Collaborative Team Practices

Track: **Pre-Award** – Level: **Intermediate** – Type: **Concurrent Session**

In the fast-paced, dynamic environment of research administration, collaborative teams are essential for success. We share our collaborative model and present the experience of establishing our model from three perspectives. We will discuss the definition of a collaborative team, discuss its benefits and challenges, provide tips/tricks for establishing your own collaborative practices, and explore how this robust form of team work ultimately strengthens pre-award teams and supports the transition of proposals to funded awards.

Learning Objectives:

- Describe the collaborative team model.
- Discuss how a collaborative team model addresses common pre-award pitfalls/challenges.
- Help participants use the lessons learned and tips/tricks to build collaborative practices on your teams.
- Explore how this model can support the entire grant lifecycle from pre-award to post-award.

Hang McLaughlin – Grant and Contract Manager, University of Minnesota

Mellani Lubuag – Post-Award Project Manager, University of Minnesota

International Subawards – Development, Management, Challenges

Track: **Post-Award** – Level: **Intermediate** – Type: **Concurrent Session**

In an increasingly interconnected world, international collaborations are becoming indispensable for developing solutions to address global research challenges. However, such collaborations entail very specific risks related to diverse administrative, cultural, and legal frameworks. Consequently, conceiving, issuing, and monitoring agreements to support the collaborations is a delicate balancing act. This session will cover all stages of the collaboration process, including pre-proposal, implementation, and closeout, with a focus on key considerations for each stage.

Learning Objectives:

- How to identify and manage unique challenges at proposal, award, and post-award stages and at closeout.
- Understand the importance of proper closeout of an international collaboration and the steps necessary to prepare for an audit.
- Understand the importance of the primary compliance issues facing international collaborations.
- Understand the new NIH requirements for international collaborations.

Alina Negomireanu – Senior Sub-Award Officer, University of Chicago
Diane Domanovics – R&D Research Consulting Group

Crossing the Divide: Building an Impactful Research Administration Collaboration with Intentionality

Track: **PUI & Research Development** – Level: **Intermediate** – Type: **Concurrent Session**

Working collaboratively lies at the core of effective research administration, requiring deliberate efforts to achieve measurable success and meaningful outcomes. This session draws from the collaborative experiences of the University of Wisconsin-Milwaukee and Augsburg University, highlighting the synergy between Research Development and Research Administration. The discussion will explore strategies for purposefully fostering collaboration to enhance university research productivity. Topics include navigating the entire research lifecycle, from inception to proposal to award, and effectively managing resources amidst challenges such as budget cuts, turnover, and additional administrative burdens. Furthermore, we'll emphasize the integration of Diversity, Equity, and Inclusion principles into each stage, illustrating how a cohesive approach can propel organizational advancement. John Anderson will present insights from his capstone project in the Region IV Mentoring Our Own (MOO) initiative, offering a perspective from a Primarily Undergraduate Institution (PUI). The session will delve into leveraging faculty expertise to mentor junior faculty, fostering communities of best practice, and cultivating a grant-writing culture.

Learning Objectives:

- Participants will glean valuable insights from diverse institutional experiences, learning from both successful endeavors and challenges.
- The session encourages open discussion and welcomes participants to share their concerns and ideas.
- Attendees will gain a deeper understanding of evaluating organizational strengths and structures, fostering collaboration between research development and administration. This partnership-oriented approach aims to empower participants with practical knowledge to enhance their institutions' research support systems.

Samantha Westcott – Grants Manager, University of Wisconsin-Milwaukee
John Anderson – Director of Grants & Sponsored Programs, Augsburg University
Michelle Schoenecker – Research Development Specialist, University of Wisconsin, Milwaukee

Conflicts of Interest - Policies, Processes, and Ways to Help

Track: **Compliance** – Level: **Overview** – Type: **Concurrent Session**

This session will provide an overview of the identification and review process for individual and institutional conflicts of interest (COI) in research, including review of outside activities to evaluate if a potential conflict exists, identification of conflicts, triaging review of perceived or actual conflict situations, conflict determinations, and conflict management. New(er) federal sponsor COI policies will be highlighted, in addition to the connectivity between COI and sponsor disclosure requirements. Similarities and differences of campus and medical school COI perspectives and approaches to COI management will be shared. This session will call attention to requirements and provide suggestions of tangible ways research administrators can help with the COI process to prevent delays.

Learning Objectives:

- Acquire knowledge of COI review processes, COI policies, and similarities/differences between campus and medical schools.
- Better understand the potential roadblocks that may occur during COI reviews.
- Obtain concrete ways of how they can assist in the COI review process.

April Pepperdine – COI Director, University of Michigan

David Mulder – Assistant Director Regulatory Affairs, University of Michigan

Implicit Bias and Microaggressions in Midwest Culture: How Research Administrators can Identify and Aid in Advancing JEDI in Higher Education and Research

Track: **Human Capital** – Level: **Overview** – Type: **Concurrent Session**

Building on the portion of last year's DEI session, "DEI In Action," on unconscious bias and Midwest nice, this session will be a deeper dive into implicit bias and microaggressions in Midwest culture. Attendees will learn more about JEDI (Justice, Equity, Diversity, and Inclusion) and gain more insight on current best practices, actions, and tips that research administrators and those we support can learn and use in real-world scenarios.

Learning Objectives:

- Identify implicit bias and microaggressive words, behaviors, etc. as they relates to the culture we live in, in the Midwest.
- Develop tools and best practices to better tackle real-life situations and be better allies.
- Increase understanding of the role we all play in advancing JEDI in our institutions and industries.

Jenny Yuan – Finance and Grant Administrator Manager, University of Wisconsin-Madison

Sharing Ideas for Managing a Multi-Faceted Departmental Portfolio

Track: **Departmental** – Level: **Overview** – Type: **Discussion Session**

Departmental level administrators generally have to cover multiple aspects of the research application and award process. When your faculty have varying levels of experience, research interests, and experiences, having some great tricks and tools to help yourself, your department, and your faculty navigate this multi-faceted landscape will benefit everyone. This will be a discussion session with some scenarios (if needed) to lead conversations around tips, tricks, and tools of a wide breadth of research for the departmental level administrator.

Kelly Andringa – Research Manager, University of Iowa

2:00 pm – 2:15pm: Break

2:15 pm – 3:15pm: Poster Session & Spark Sessions

Poster: Using Conversational AI to Accelerate Research Discovery and Application

Sandra Alberto, University of Michigan Medical School

The UMMS Office of Research Grant Services & Analysis unit was awarded an internal grant to support the implementation of the AI tool and study its use and impact. The poster would detail the design of the research process and provide an overview of challenges and successes related to the development of the knowledge base and AI interface and its implementation within the Medical School webpages.

Poster: Expanding Research and Grant-Writing Capacity at PUIs

John Anderson, Augsburg University

Many PUIs lack the resources (personnel, data systems, etc.) needed to develop a robust external grants portfolio. This project develops a model for increasing grant-writing and research capacity at PUIs that emphasizes identifying and leveraging existing institutional resources, namely the expertise of the faculty. The model activates faculty expertise by implementing 1) discipline-specific grant-writing communities of practice led by tenured faculty with a strong track-record of grant-supported research, and 2) a task force of tenured faculty to identify key ways to make the PUI marketable as a research partner to larger institutions.

Poster: Growing Your Workplace

Katie Baber-Dillavou, Iowa State University

Examining Brené Brown's list of Armored versus Daring Leadership in Dare to Lead and providing space for people to individually break down how to change their armored leadership to daring leadership and how to support that change.

Poster: Go with the Flow: An Automated Proposal Intake Process Built in Office 365

Theresa Couch, Michigan State University

This poster models the automated proposal intake process developed and implemented for the Health Colleges Research Services office at Michigan State University. The intake process gathers initial proposal information, and automatically notifies different offices/contacts based on proposal parameters, stores proposal data, and allows for extensive reporting. The process utilizes Microsoft 365, including SharePoint, Microsoft Forms, Power Automate, OneDrive, and Teams.

Poster: Community-Based Organization Research Administration Management Portal

Jennifer Foley, Medical College of Wisconsin

Smaller community-based organizations (CBOs) face significant challenges in navigating the administrative complexities of federal grant development, award, and post-award management processes. Despite their potential to effectively address various community needs through mission-driven services with focused outcomes, these organizations often struggle due to limited staffing and experience required for engaging in grant proposal processes. Even as subcontractors, the numerous steps involved in the application process can be overwhelming and induce anxiety. Moreover, the absence of robust infrastructure to manage these procedures can impede academic organizations' ability to collaborate with CBOs for research and program development. If smaller CBOs are unable to compete effectively for substantial grant funding opportunities, it can ultimately curtail the maximum benefits they could offer to the populations they serve at local, state, and national levels. The underlying premise of this initiative is to develop a tool that connects CBOs with administrative volunteers who can provide support in grant administration and financial processes. By facilitating this connection, the aim is to empower CBOs to better manage grant-related tasks and ultimately enhance their ability to serve the community and its constituents effectively.

Poster: External Grants and Administrative Tasks – The Burden is Real

Heather Johnson Schmitz, University of Wisconsin – Eau Claire
Esther Eke, University of Wisconsin – Oshkosh

From Nov. 2023 to Mar. 2024, eight Universities of Wisconsin comprehensive campuses conducted an "External Grants and Administrative Tasks" survey. Respondents (N=386), most faculty, estimated the number of hours per month spent on a list of non-research administrative tasks. The average cumulative monthly time burden across all tasks was 73 hours per month, or 46% effort. More concerning, 48% of respondents answered "yes" when asked whether their experience with these administrative grant tasks discouraged them or their departments from seeking additional grants. The significance of this burden aligns with the findings of a national survey by Federal Demonstration Partnership (FDP; Rockwell, 2009). There is clear indication, locally and nationally, of the burdens on the research enterprise and potential limitations on access to federally funded research, especially for PUI institutions.

Poster: All Together Now! Project Teams and Research Admins Working Effectively Together

Melissa Karby, University of Michigan
Jessica Roche, University of Michigan

Proposal submissions have many requirements and deadlines. For proposal success, research administrators work with project teams across many disciplines to put the proposal together. This poster will dive into how the Research Administration Team in the Office of the Vice President for Research and the Institute for Firearm Injury Prevention fostered collaborative proposal submissions.

Poster: Homegrown: Experiences in Entry-Level Training in Research Administration

Melanie Miller, The Ohio State University of Science and Technology

Experiences in entry-level research administration training after a career change. As a result of increased research administration demands and hiring challenges, The Ohio State University College of Medicine Grants Office (GMO) invested resources into the development of an associate team of entry-level research administrators to address the need for well-trained, experienced administrators. Insights from a recently promoted associate.

Posters: NCURA Region IV Committees

Committee Members

We will have a variety of posters from NCURA Region IV committees. Learn what's going on with Region IV and how you can get involved!

Spark Session: Moving Forward: Taking Armored Leadership and Making it Daring

Katie Baber-Dillavou, Iowa State University of Science and Technology

Examining Brené Brown's list of Armored versus Daring Leadership in Dare to Lead, and providing space for people to individually break down how to change their armored leadership to daring leadership and how to support that change.

Spark Session: Managing Project Closeout

Diane Domanovics, R&D Research Consulting Group

This spark session will discuss the challenges of prioritizing and the collaboration which needs to occur between central and departmental administrators to ensure timely and compliance closeouts of sponsored projects.

Spark Session: The Purpose Driven Research Administrator

Sue Kelch

Research administrators play a crucial role in the research enterprise. But what exactly is this role and how is this role defined? Is our role defined by the tasks that we perform or by the outcomes that result from our efforts? By understanding your purpose as a research administrator, you can better define your role and value to your constituents and within the research enterprise.

Spark Session: Work from Where You Are

Anna Taylor, University of Michigan Medical School

Session participants will be asked to think about things in their workplace that promotes diversity, equitiy, and inclusion. What are ways a place can show they have a commitment to embracing diversity and providing equity and inclusion? Has your organization done more than draw up an HR policy? Are their ways that people regularly have a chance to engage this aspect of their community-work life? This is a conversation about the activities, discussions, events and small ways that employees are invited to think about diversity, equity and inclusion in the course of their work life.

3:30pm – 4:30pm: Tuesday Afternoon Session

Cost Transfers: The Good, the Bad, and It Depends - A Card Game

Track: **Post-Award** – Level: **Basic** – Type: **Concurrent Session**

Are cost transfers really a bad thing? Can they be avoided? Are there good reasons for them? In this interactive session attendees will work through cost transfer case studies in a form of a card came.

Learning Objectives:

- Understand the importance of cost transfer wording.
- Learn closeout triage techniques to determine what expenses should be transferred, if any.
- Learn best practices to avoid cost transfers.

Sandy Fowler – Assistant Dean for Research, University of Wisconsin-Madison

Katie Schortgen – Grants and Contracts Management Senior Analyst, The Ohio State University

Being an Ally for the PI – Strengthening Research Administration through Collaboration

Track: **Departmental** – Level: **Overview** – Type: **Concurrent Session**

One of the critical players in research administration isn't a research administrator at all – it's the PI! As research administrators, we balance a customer service role with the practicalities of sponsor requirements, institutional policies, and state and federal regulations. One key way to make those interactions more positive and productive is to build strong relationships with principal investigators. Join three veteran research administrators with experience in a variety of roles and settings to discuss successful strategies (as well as some that may not have been so successful) to ensure faculty see you as an ally rather than a hindrance to their research.

Learning Objectives:

- Understand the needs and demands of principal investigators.
- Discuss strategies for balancing customer service and compliance.
- Share successful approaches to building strong relationships with faculty/principal investigators.

Kristin Harmon – Intellectual Property Disclosure Manager, University of Wisconsin-Madison

Amanda Gibbs – Associate Director -College of Medicine Grants Management Office, The Ohio State University

Jim Maus – Senior Grant Specialist – Department of Neuroscience, Washington University in St. Louis

Uniform Guidance 2 CFR Edition – Proposed Revisions

Track: **Federal** – Level: **Overview** – Type: **Concurrent Session**

Do not miss this opportunity to learn about the final revisions (*) to the Uniform Guidance 2 CFR! In this comprehensive review, participants will learn about the newest policy updates and how their respective institutions may be impacted.

(*) Note that OMB is planning to issue the final revisions by March 2024. We will include the Federal Register link when the document is published. If the revisions are not published by conference time, we will modify the "final revisions" to "proposed revisions."

Learning Objectives:

- Learn about the major revisions.
- Learn how the revisions will impact administration of research grants.
- Learn when the revisions become effective.

Gil Tran – Attain

Calleen Roper – Associate Director for Research, University of Wisconsin-Madison

Research Security and International Research Activities: Finding Balance – Fostering Research While Understanding and Complying with the Latest Federal Requirements

Track: **Compliance** – Level: **Overview** – Type: **Concurrent Session**

This session will review the latest information on NSPM-33 implementation, including federal agency-specific implementation of common disclosure forms and deviations, agency-specific use of SciENcv, federal training modules and implementation, and research security program standards, with open discussion on the approaches institutions are taking to comply with the requirements. Agency risk matrices and institutions' efforts to address inconsistencies and areas of uncertainty regarding the conduct and disclosure of outside activities will also be discussed, as will foreign gift and contract reporting and the addition of reporting to the National Science Foundation. Related efforts of the Federal Demonstration Partnership, higher education associations, and other groups offering resources and guidance will be noted. This will be a highly interactive session addressing research security topics broadly and providing institutional approaches and solutions to communicating and implementing changes while facilitating international research activities and principled collaborations.

Learning Objectives:

- Gain knowledge of the latest information on federal research security requirements.
- Understand potential institutional approaches to address research security requirements and possible applicability to their local efforts.
- Gain knowledge of federal and community resources and guidance to facilitate local implementation of and compliance with federal research security requirements.

Lisa Nichols – Executive Director Research Security, University of Michigan
April Pepperdine – COI Director, University of Michigan
David Mulder – Assistant Director Regulatory Affairs, University of Michigan

Using Email as a Time Management Tool

Track: **Data Metrics & AI** – Level: **Basic** – Type: **Concurrent Session**

In today's fast-paced work environment, effective communication and streamlined organization are essential for success. Join our workshop, "Mastering Microsoft Outlook," where you will gain practical insights and hands-on skills to enhance your productivity, optimize your time management, and leverage the full potential of Microsoft Outlook. Professionals at all levels who use Microsoft Outlook for email communication, scheduling, and organization should attend. Whether you're a beginner looking to build a solid foundation or an experienced user aiming to enhance your skills, this workshop is tailored to meet your needs. Don't miss this opportunity to unlock the full potential of Microsoft Outlook and take control of your workday. Join us for a transformative learning experience that will empower you to work smarter, not harder.

Learning Objectives:

- Gain knowledge about outlook customization and organization
- Working with Calendar and Email
- Email Time Management

Denise Jurca – Department Administrator, University of Iowa

Professional Growth through Feedback on your RA Team

Track: **Human Capital** – Level: **Intermediate** – Type: **Discussion Session**

RAs tend to work individually, and after completing one task (one proposal or one projection), quickly move on to the next. What would an individual or team look like if feedback loops were regularly a part of the team culture. How much could we all excel in our growth and be stronger RAs? In this discussion, we will explore what individuals and teams have implemented to incorporate feedback, and the benefits it has provided.

Catherine Barrera – Senior Director of Research Administration, Northwestern University

Maura Cleffi – Manager of Research Administration, Northwestern University

5:00pm – 6:00pm Focus Group

Focus Group: Leveling the Grant Proposal Playing Field: Increasing Research Capacity for Social Sciences, PUIs, and HBCUs

Clair Green Schwartz, University of Cincinnati

The research enterprise has changed drastically in the last 50 years. While these changes have brought new opportunities for some organizations, others have been left behind. In 2023, the National Science Foundation funded a series of convenings to identify challenges, barriers, and potential solutions to increasing social science research across the country. This session will seek input and feedback from research administrators on barriers to increasing federal funding in the social sciences and at PUIs and HBCUs in general. Participants will have access to new, free, open source research materials compiled as a result of this project.

7:00pm – 9:30pm: Tuesday Night Event

Our Tuesday Night event will take place at Ann Arbor’s iconic Revel and Roll! We’re looking forward to a night of fun, dancing, and bowling at one of Ann Arbor’s favorite places!

9:00pm: Hospitality Suite

Wednesday, May 1st

7:30am – 10:00am: Registration Desk

7:30am – 9:00am: Breakfast

8:15am - 9:00am: Region IV Business Meeting (and Breakfast)

Join us for a hot and hearty breakfast and the annual Regional Business Meeting. We will introduce current and incoming officers, describe ongoing initiatives, and provide information on the regional activities. Come get involved in Region IV!

9:15am – 10:15am: Wednesday Morning Session

What You Don't Know That You Need to Know About Intellectual Property

Track: **Pre-Award** – Level: **Overview** – Type: **Concurrent Session**

Most research administrators have heard of intellectual property, but the degree to which they actually interact with IP can vary widely. Those in departments, primarily undergraduate institutions, and other units less focused on intellectual property and compliance may only hear IP and the Bayh-Dole Act mentioned in passing. What should every research administrator know about IP – at the proposal stage, during award negotiation and acceptance, during post-award administration, and at closeout? What can you look for to avoid and anticipate potential issues, and to provide the best advice and service to your PIs and institution? An intellectual property manager and technology transfer manager will provide an overview of intellectual property concerns and their implications, and answer your burning questions about IP.

Learning Objectives:

- Understand intellectual property regulations and terminology impacting research administration.
- Learn to recognize implications of intellectual property terms in RFPs and sponsored funding agreements.

Kristin Harmon – Intellectual Property Disclosure Manager, University of Wisconsin-Madison

Chase Bunger – Research Contracts Administrator, University of Missouri

The Mysterious World of Cost Sharing!

Track: **Post-Award** – Level: **Basic** – Type: **Concurrent Session**

Prepare for a roller-coaster ride through the world of real-time cost-sharing cases! Join us as we unravel mysteries together and dive deep into the intricate realm of real-life cost-sharing world.

Learning Objectives:

- Learn when and if cost sharing is necessary.
- Collaborate in problem-solving skills as they tackle real-world cost-sharing cases.
- Identify different kinds of cost-sharing arrangements.
- Explore real-world examples of cost-sharing challenges and solutions.

Rula Karapatsakis – Finance Manager, University of Michigan

We're All In It Together....Aren't We? Working with Other Institutional Groups in Research

Track: **Departmental** – Level: **Intermediate** – Type: **Concurrent Session**

In addition to pre- and post-award activities, departmental research administrators often have to work with other research groups, such as clinical trial researchers, lab researchers, accountants, and central sponsored projects administrators. However, sharing resources across institutional groups has its challenges. In this talk, we will address ways to better collaborate with these groups.

Learning Objectives:

- Identify the benefits and challenges of collaborating with other institutional research groups.
- Describe tips and tools for collaborating with other institutional research groups (clinical trial researchers, accountants, central sponsored projects, etc.).

Hang McLaughlin – Grants and Contract Manager, University of Minnesota

Mellani Lubuag – Post-Award Project Manager, University of Minnesota

NIH OPERA Updates

Track: **Federal** – Level: **Overview** – Type: **Concurrent Session**

Do not miss this opportunity to hear about what is new and what is being developed within the National Institute of Health's (NIH) programs, policies, and budgets. In this comprehensive review, participants will learn about the newest policy updates and how their respective institutions may be impacted. Upon completion of the presentation, participants will have the opportunity to ask questions about new and existing policies and procedures. Topics include recent and upcoming changes to NIH policy, compliance requirements, and so much more!

Learning Objectives:

- Learn about NIH's budget priorities.
- Learn about new policies and compliance initiatives.
- Gain insight into current issues at NIH.

Ashley Alexander – National Institutes of Health (virtual)

How to Keep Your Subs from Sinking: Managing the Subcontract Process With Limited Resources

Track: **Compliance** – Level: **Basic** – Type: **Concurrent Session**

The number of subcontracts executed and issued by the University of Missouri has increased consistently each year since 2019. However, it is challenging to increase resources to assist in administering subcontracts. This session will discuss the subcontract process and workflow at the University of Missouri and how it is managed. In addition, the session will address how subcontract invoices are managed.

Learning Objectives:

- Present and give possible solutions to subcontract workflow problems.
- Present ideas and solutions to subcontract invoice issues.

Chad Hampton – Associate Director Post-Award, University of Missouri

Melissa Old – Compliance Manager, University of Missouri

Advancing the Scholarship of Research at a PUI

Track: **PUI & Research Development** – Level: **Intermediate** – Type: **Discussion Session**

PUIs face a number of significant challenges that stand as barriers to increasing research and sponsored program activity. While research administrators at PUIs are very familiar with these barriers, few examples exist that demonstrate how to advance a campus culture in a way that increases research and scholarly activity leading to a designation as an "Emerging Research Institution." This session will identify and discuss those strategies that can contribute to a culture change.

Anne Hoeltke – Director of Research and Sponsored Programs, University of Wisconsin-Stout

Carl Fox – Chief Research Administration Officer, University of Wisconsin-Whitewater

10:45am – 12:00pm: Closing Session

Returning to the Office: Reset, Recharged, Renewed!

Track: **All Conference** – Level: **All** – Type: **Concurrent**

A final session to meet with colleagues, get last questions answered, and have a bit of fun! Based on the game Grants Land, we will revisit key learning opportunities from throughout the conference. No need to be an expert in everything! The room will be divided into teams and work together as we walk through questions that will help bolster (or maybe expand!) your knowledge. At the beginning of the session, you will help make game cards so bring your questions to the group! A fantastic opportunity to connect, reflect, and reenergize before heading out on the road as the meeting adjourns.

Sandy Fowler – Assistant Dean for Research, University of Wisconsin-Madison

Heather Offhaus – Director, Grant Services & Analysis, University of Michigan Medical School

12:00pm: Meeting Adjourns