

# KANSAS CITY MO

**NCURA Region IV  
Spring Meeting  
May 1-4, 2016**



**Exchanging  
Talents  
through Guidance**



**Region IV Presents:**  
**Exchanging Talents through Guidance**

Region IV welcomes you to Kansas City, well known for jazz, fountains, and barbecue! Kansas City, whose nickname is “The City of Fountains,” has wide boulevards, bountiful parks, and beautiful architecture. More than 200 fountains stand ready to welcome you, and more than 1,000 of the city’s structures are included on the National Register of Historic Places. The Country Club Plaza is within walking distance of the meeting site and has more than 170 shops and restaurants, all on beautiful streets.

Research Administration pride shows through all of us in our passion to volunteer, mentor others in the field, and learn from our colleagues. As you plan which sessions, workshops, and events you will attend, remember one thing – the most rewarding experience you will have is to **Get Involved!!**

**Workshops:** Designed as a complete one-day learning event or as a pre-conference warm-up, workshops include valuable instruction for pre- and post-award administrators, managing clinical trials, department administration, and the **free workshop** on developing effective presentations.

**Keynote Speaker:** [Dawn Kaiser](#) will show us how to be successful with a “Heart of Change.” A book could be written about the amount of change in research administration, and Dawn will give us some tools to manage change in our daily lives.

**Concurrent Sessions:** Select from a variety of tracks, including *Governmental/Federal, International, Medical/Compliance, Post-Award, Pre-Award, Primarily Undergraduate, Professional Development, Senior and Spark Sessions*. Also included are Federal updates from NSF and NIH.

**First Annual Concepts Expo Poster Session:** Provides colleagues with a platform to share ideas, theories, fixes, and procedural concepts. Each Region IV Committee also will have a poster to provide information.

**Newcomer Concierge:** Available for first-time NCURA meeting attendees, you can request a “concierge” to help guide you around the conference and any related events, as well as introduce you to others.

**Volunteer Opportunities:** Volunteer at the registration desk, Hospitality Suite, Monday Night dinner groups, Newcomer Reception, or as a session evaluator. Volunteering is a great way to network with colleagues and add value to your membership.

**Networking Events:**

| Sunday Night   | Monday Night  | Tuesday Night   |
|--|---|---|
| Join the fun at the <b>Welcome Reception</b> with old and new friends as we have dessert and listen to jazz by one of our very own Region IV members and his band. | After attending the <b>Newcomer Reception</b> , choose a <b>Dinner Group</b> and meet up at the <b>Hospitality Suite</b> afterwards.<br>The Kansas City Royals are scheduled to play at home. | Our <b>Evening Reception</b> is a country-themed event complete with food, beverages, music, and dancing. Line dancing lessons will be offered. Wish your colleagues farewell in the <b>Hospitality Suite</b> . |

**The Program Committee has been awesome to work with, and this conference would not happen without you and your colleagues volunteering their talents and giving back to our exceptional region!**

**Diane Hillebrand**  
*Program Chair*

**Michelle Ginavan Hayes**  
*Program Committee Co-Chair*

**Shannon Sutton**  
*Program Committee Co-Chair*

## 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, defined as 10 hours of program contact (1 CEU = 10 hours of education programming). In other countries, such as Canada, CEUs are known as Continuing Education Credits (CECs).

For attendance verification, please email a list of all modules you attended to [NCURA Region IV](mailto:ncura@ncura.org) (<http://www.ncuraregioniv.com/contact.html>) after May 6, 2016.

### **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](http://www.racc.org).

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**Thank you to our sponsors of this year's meeting**



## Sunday, May 1

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

8:30am – 4:45pm      **All-Day Workshops**

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

10:00am – 10:30am      **Morning Workshop Break**

12:00pm – 1:15pm      **Lunch**

1:15pm – 4:45pm      **Afternoon Workshops**

2:30pm – 3:00pm      **Afternoon Workshop Break**

6:00pm – 9:00pm      **Opening Reception: Dessert & Jazz**  
*Meet or reconnect with colleagues and share a toast to kick-off the conference!  
Listen to jazz by one of our very own Region IV members and his band, and  
enjoy delectable desserts in the Rooftop Bar of the hotel.*

9:00pm – Midnight      **Hospitality Suite**  
*Located in the Rooftop Bar, the Hospitality Suite is open each night,  
offering a place to unwind and join colleagues.*

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



## Sunday, May 1

### All-Day Workshops: 8:30am – 4:45pm

7:30am – 5:00pm

Registration Desk and Exhibits

12:00pm – 1:15pm

Lunch for All-Day Workshop Attendees

#### WORKSHOP #1 8:30 – 4:45

##### Basics of Pre-Award Research Administration

*Level: Basic*

This full-day, activity-rich workshop provides an introduction to what every pre-award research administrator should know. Attendees will engage in exercises that address roles and responsibilities in research administration, the lifecycle of an award, budgeting and cost-sharing, allowable costs, and different award and sponsor types.

Participants will learn:

- How their job fits into the wider research administration enterprise.
- Strategies for assisting faculty with proposal development and submission, including funding opportunities.
- Process review for sponsored research, training, and public service projects.
- Tips and tricks that increase the chances of proposal success.
- Key concepts that protect the institution's good standing and increase the likelihood of a smooth project implementation.
- How to serve as a liaison with sponsors for non-financial award management matters, such as prior approval requests.



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*Deborah Maloney, Director Sponsored Projects Administration, University of Kansas Medical Center*

*Patrick Medina, Director of Grants & Contract Services, Research and Sponsored Programs, University of Wisconsin-Madison*

*Lorelei Sells, Assistant Director of Sponsored Programs Administration, University of Kansas Medical Center*

#### WORKSHOP #2 8:30 – 4:45

##### Basics of Post-Award Research Administration

*Level: Basic*

This full-day, activity-rich workshop provides an introduction to what every post-award research administrator should know. Attendees will engage in exercises that address roles and responsibilities in research administration, the lifecycle of an award, budgeting and cost-sharing, allowable costs, and different award and sponsor types. Additional topics include award acceptance and management, allowability, effort reporting, cost transfers, subcontracts and closeouts. Lastly, an overview of the Uniform Guidance requirements is provided, as we have moved from the previous OMB Circulars (A-110, A-21, A-133) to 2 CFR 200.

Participants will learn:

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



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*Amy Rosson, Senior Accountant, University of Missouri – Columbia*

*Jamie Szabo, Senior Compliance Manager, University of Missouri*

## Sunday, May 1

|                  |  |
|------------------|--|
| 7:30am – 5:00pm  | <b>Registration Desk Open and Exhibits</b> |
| 8:30am – 12:00pm | <b>Morning Workshops</b>                   |
| 1:15pm – 4:45pm  | <b>Afternoon Workshops</b>                 |

### Morning Workshops

#### **WORKSHOP #3 8:30 – 12:00**

##### **Clinical Trials: The Inside View of Clinical Research Administration**

**Level: Intermediate to Advanced**

This workshop focuses on managing the unique aspects of clinical research, including an overview of clinical trials. Attendees will participate in a discussion to better understand clinical trials in an academic research setting. Tools will be demonstrated and case studies used to illustrate the content.

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

Participants will learn:

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

Prerequisite:

- Participants should have a general understanding of clinical research administration.



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*Brian Farmer, Senior Director Finance and Academic Affairs, The Cleveland Clinic*

#### **WORKSHOP #4 8:30 – 12:00**

##### **Departmental Research Administration**

**Level: Basic**

A Departmental Research Administrator (DRA) oversees and coordinates all aspects of sponsored project administration at the department level in support of the researcher. As a liaison between central offices, faculty, and staff, DRAs also serve as educators while striving to ensure compliance with federal regulation and institutional policies. This session will provide a basic understanding of a Departmental Research Administrator's responsibilities, as well as provide tools and strategies for success. Topics include proposal development, award review, subaward agreements, costs transfers, cost-sharing, closeout, and audits.

Participants will learn:

- The diverse role of the Departmental Research Administrator.
- How to manage sponsored projects at the departmental level.
- How federal regulations and institutional policies impact their work.



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*Stephanie Hober, Grants Specialist Diagnostic Medicine/Pathology, Kansas State University*

## Afternoon Workshops

**WORKSHOP #5 1:15 – 4:45pm**

### **Uniform Guidance: Where Are We Now? Post-Implementation**

**Level: Beginner to Intermediate**

Come prepared to hear from the presenters about their journeys with the Uniform Guidance post-implementation, and be prepared to share your own experiences (positive and otherwise) with the Uniform Guidance. We will discuss aspects of the Uniform Guidance that continue to pose challenges and talk about strategies to resolve them. We also will review and discuss what FDP and COGR have done to help institutions educate their faculty and administrators.



Learning Objectives:

- Share information and best practices about UG implementation at their institutions.
- Discuss challenges related to the Uniform Guidance and strategies to resolve them.
- Leave with concrete ideas about moving forward with the Uniform Guidance post-implementation.

Prerequisite:

- Participants should have a general understanding of Uniform Guidance.

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*Diane Domanovics, Assistant Vice President for Sponsored Projects, Case Western Reserve University*

*Craig Reynolds, Director, Office of Research and Sponsored Projects, University of Michigan*

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

**WORKSHOP #6 1:15 – 4:45pm**

### **Effective Presentations FREE! FREE! FREE!**

**Level: Basic**

As a research administrator and NCURA member, you often may need to explain issues surrounding sponsored research and the administration of grants and contracts. Yet these skills may be different than those necessary to effectively serve as NCURA discussion leaders, panelists, or workshop faculty. Integrating adult learning theory and techniques into presentations can make the difference between attendees surfing the Web on their smart phones or being fully engaged.



This workshop will discuss effective presentation styles and techniques, and explore the complexities of team presentations, particularly those involving colleagues from other institutions and even around the globe. We also will clarify the different types of NCURA presentations and their varying roles and duties.

**FREE! FREE! FREE!**

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*Tricia Callahan, Director Proposal Development, Office for the Advancement of Research & Scholarship, Miami University*

*Heather Johnston, Assistant Director & Information Coordinator, Miami University*

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

**WORKSHOP #7 1:15 – 4:45pm**  
**Using Excel Effectively: Tips and Tools**  
**Level: Basic**

Microsoft Excel has long been a standard tool for proposal budget development and research data analysis. In this basic workshop participants will be exposed to elementary Excel navigation, terms, tools, formulas, and shortcuts to create spreadsheets, process data, and perform analysis. Attendees will follow the steps on-screen via their personal laptop. No extensive Excel experience is required, and no question is too simple. An illustrated guide will be provided as a takeaway desk reference for follow-up practice. Come prepared to Excel!



Learning Objectives:

- Basic navigation within a spreadsheet and workbook tabs.
- Simple formatting, highlighting, filtering, text boxes, and display options (freeze panes).
- Elementary tools such as cutting and pasting, inserting and deleting, find and replace, and fill.
- Rudimentary formulas, AutoSum, PivotTables, Vlookup.

Prerequisite:

- Rudimentary experience with Excel, and a laptop or notebook computer with either Microsoft Excel 2007, 2010, or 2013 installed (MAC OS not supported for this workshop).

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**Robert Aull**, Director of Research Administration, Indiana University School of Medicine

**Gavyn Clasemann-Ryan**, Associate Director of Research Administration, Indiana University School of Medicine

**Craig Vektor**, Data Analyst, Research Administration, Indiana University School of Medicine

6:00pm – 9:00pm

**Dessert & Jazz**

*Meet or reconnect with colleagues and share a toast to kick-off the conference! Listen to jazz by one of our very own Region IV members and his band, and enjoy delectable desserts in the Rooftop Bar of the hotel.*

9:00pm – 12:00 Midnight

**Hospitality Suite Open**

*Located in the Rooftop Bar, the Hospitality Suite is open each night, offering a place to unwind and join colleagues.*

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

## Monday, May 2

- 6:00am – 7:00am **Morning Yoga**
- 7:00am – 5:00pm **Registration Desk & Exhibits**
- 7:00am – 8:30am **Continental Breakfast**
- 8:30am – 8:45am **Introduction and Opening Remarks**
- 8:45am – 10:00am **Keynote Speaker**
- 10:00am – 10:30am **Morning Break**
- 10:30am – 12:00pm **Concurrent and Spark Sessions**
- 12:00pm – 1:00pm **Awards and Recognition Lunch**
- 1:15pm – 2:15pm **Concurrent and Spark Sessions**
- 2:15pm – 2:45pm **Afternoon Break**
- 2:45pm – 3:45pm **Concurrent Sessions**
- 4:00pm – 5:00pm **Concurrent Sessions**
- 5:00pm – 6:00pm **Newcomers' Reception**  
*Everyone new to NCURA or new to the Regional Meeting is invited to join Region IV leadership in the Rooftop Bar for refreshments and to learn more about the organization. From here we will help connect you with your Dinner Group.*
- 6:00pm – 9:00pm **Dinner Groups**  
*Sign-up near the Registration Desk to join other NCURA attendees and experience the local fare Kansas City has to offer. Dinner Groups will meet in the lobby at 6:00pm for reservations at nearby restaurants.*
- 9:00pm – Midnight **Hospitality Suite**  
*Located in the Rooftop Bar, the Hospitality Suite is open each night, offering a place to unwind and join colleagues.*



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

## Monday, May 2

6:00am – 7:00am

### **Morning Yoga**

Join NCURA's own Tara Bishop to start off your day right with a morning yoga session in Conference Suite 441. **Brand-new yogis welcome!** We will gather at 6:00am and begin with our opening meditation at 6:15am. Please bring a yoga mat or towel.

7:00am – 5:00pm

### **Registration Desk and Exhibits**

7:00am – 8:30am

### **Continental Breakfast**

8:30am – 8:45am

### **Opening Remarks**

8:45am – 10:00am

### **Keynote Speaker**



### **Dawn Kaiser**

#### **Inspirational Speaker and Joy Refueler**

**Topic:** *The Heart of Change: Leading a Successful Team Transformation*

Dawn Kaiser's presentation explores the heart of change and the techniques you can use to help your team move forward one step at a time. In today's fast-paced world, change is inevitable. As a leader, you are tasked with helping your team members adapt to the myriad of changes they face. However, when we only address change from a head space, we miss a key piece of the picture. Drawing on her extensive experience as a certified HR professional, author, and entrepreneur, Dawn inspires individuals to unleash the joy in their life, in their work, and in their leadership. Dawn is a graduate of University of Illinois Urbana-Champaign, a student of life, and a teacher of living. She has a Bachelor's degree in Business and a Master's degree in Education.

10:00am – 10:30am **Morning Break**

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

### **National Institutes of Health Update (Videoconference)**

#### **Government/Federal, Update, Concurrent Session**

This session is a review of what is new and developing with the National Institutes of Health's programs, policies, people, and budget. Participants will learn about changes affecting their institution.

Learning Objectives:

- Participants will understand upcoming changes to NIH policies and procedures.
- Participants will learn about current and future NIH budgets and agency priorities.

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**TBD**

**Session Moderator:** *Patience Graybill Condellone, Grant Analyst, Washington University in St. Louis*

### **F&A Proposals/Rates: What Every University Administrator Should Know**

#### **Post-Award, Basic/Intermediate, Concurrent Session**

This session will help participants understand the Facilities & Administrative (F&A) Rate Proposal process and related topics. We'll begin with a discussion of Uniform Guidance 2 CFR Part 200 definitions and general requirements, and address the importance of F&A rates and recoveries to educational institutions, as well as the vital role of university/departmental administrators. This will lead into a discussion of the methodology for developing F&A proposals, university costs and their treatment/flowdown within proposals, as well as a sample rate calculation. The final segment will delineate current federal staff concerns with university F&A rate proposals and conclude with a presentation of the national average F&A rates at various types of universities (e.g., public versus private, land grant).

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**Mitzi Singleton, Manager, MAXIMUS**

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

### **Knowing What You Negotiate: Contract Language for Beginners**

*Pre-Award, Basic, Concurrent Session*

As research administrators we rely on the expertise of our institution’s legal counsel, patent attorneys, and compliance experts to help us navigate research agreements. That reliance can sometimes mean we don’t have a solid enough understanding of contract terms and conditions. This session will provide a beginning-level approach to understanding contract terms and conditions, and to answer questions like: “What exactly is indemnification and why can’t we accept it?” and “What is the difference between governing law and jurisdiction?” This session will help attendees develop a strong foundation of understanding of contract terms and conditions to equip them to become better negotiators.

Learning Objectives:

- Gain a basic understanding of contract terms and conditions most commonly seen in research agreements.
- Better negotiate terms and conditions in your institution’s favor by having a more educated understanding of the contract being negotiated.

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*Megan White, Senior Grants & Contracts Administrator, Office of Sponsored Programs Administration, University of Missouri-Columbia*

*Hannah Clappitt, Senior Grants & Contracts Administrator, Office of Sponsored Programs Administration, University of Missouri-Columbia*

### **Workload Distribution: Maximizing the Efficiency and Minimizing the Frenzy in a Busy Central Office**

*Senior, Intermediate, Concurrent Session*

Large central offices are often challenged by the task of allocating workloads equitably across staff. In the pre-award world, options range from assigning proposals by sponsor to assigning them by department or staff capacity. While there is no single right answer, in this session presenters from two large central pre-award offices will share the tools they use for analyzing the distribution of work, and, more importantly, the change management processes they use to successfully deploy these tools.

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*Craig Reynolds, Director, Office of Research and Sponsored Projects, University of Michigan*

*Kathy Dams, Assistant Director, Office of Sponsored Programs, University of Illinois at Urbana-Champaign*

### **SmartSheet: Effectively Managing Multiple Projects while Maintaining Your Sanity**

*Professional Development, Basic, Concurrent Session*

This session introduces how to use Smartsheet for both pre- and post-award project management. Whether tracking documents from multiple collaborators, setting internal deadlines for proposal development, or managing limited submissions, Smartsheet has some wonderful options that takes spreadsheet-based project management to a whole new level! We will give a brief overview of Smartsheet and then present some of our sheets to demonstrate how we use Smartsheet to manage our workflow.

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*Diane M. Meyer, Pre-Award Project Manager, Engineering Research Institute, College of Engineering, Iowa State University*

*Jamy Rentschler, Program Manager, Vice President of Research, Iowa State University*

*Sue Shipitalo, Research and Training Coordinator, Office of the Vice President for Research, Iowa State University*

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

**Going "E": Strategies to Take Your e-Projects from Ideas to Reality**

*Professional Development, Basic, Concurrent Session*

Thinking about overhauling a website or developing a new award management application but feel stuck? Learn valuable techniques and useful tools to help plan and execute your next electronic project. Walk through case studies for redesigning a website, developing a post-award request management application, and integrating an enterprise-level eRA system and document management tool. Drawing on these real-life examples, this presentation provides an overview of the practical considerations for managing e-projects and special considerations for research administration in institutions of higher education. (*There is a follow-up Spark Session on Monday at 1:15pm.*)

Learning Objectives:

- Obtain a basic understanding of e-project management.
- Learn the pitfalls to avoid and the techniques to help mitigate risks.
- Learn how to set realistic timelines and manage constituents' expectations and needs.

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*Melissa Mizwa, Project Administrator, Northwestern University*

10:45am – 11:05am **Spark Session**

**Leveraging Systems to Measure and Evaluate Pre-Award Business**

*Basic*

To develop good metrics, first you need to collect the data. This session will share the experience at Northwestern University to provide more transparency into key business functions, first by implementing system-based workflow features and then developing a set of metrics based on the resulting milestone data.

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*Kimberly Griffin, Director Electronic Research Administration, Northwestern University*

11:30am – 11:50am **Spark Session**

**Shared Responsibilities: A Shared-Services Approach for Grants Management**

*Basic*

The Ohio State University College of Medicine recently implemented a shared-services model similar to those used by other universities to provide comprehensive grants administration support at the departmental level. This session will review the challenges and accomplishments of this implementation, as well as provide a synopsis of the challenges, their solutions or proposed solutions. Participants are encouraged to share ideas, practices, and approaches to these shared challenges.

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*Amy Butala, CRA, Fiscal Officer, The Ohio State University*

*Christopher Day, CRA, Grants and Contracts Specialist, The Ohio State University*

12:00pm – 1:00pm

**Lunch and Recognition Awards**

*Join us as we recognize our colleagues' success and accomplishments!*

1:15pm – 2:15pm

**Monday Concurrent and Spark Sessions**

1:15pm – 1:35pm

### Spark Session

#### **Going "E": Develop a Plan to Jumpstart your Electronic Project**

*Intermediate*

Thinking about overhauling a website or developing a new award management application but feel stuck? This Spark Session will provide an overview of practical considerations of managing e-projects and special considerations for research administration in institutions of higher education. This is a guided, hands-on exercise where participants can discuss their system challenges and develop a strategy to initiate a new e-project or restart a stalled initiative. *(This can be a follow up to the concurrent session "Going "E": Strategies to Take Your e-Projects from Ideas to Reality".)*

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*Melissa Mizwa, Project Administrator, Northwestern University*

1:15pm – 2:15pm

### Monday Concurrent Sessions

#### **National Science Foundation Update (Videoconference)**

*Government/Federal, Update, Concurrent Session*

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

Learning Objectives:

- Learn about the upcoming changes to NSF policies and procedures.
- Learn about current and future NSF budgets, agency priorities, and involvement in electronic initiatives, including advances with Research.gov.

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*Jeremy A. Leffler, Outreach Specialist, Policy Office, Division of Institution & Award Support, National Science Foundation*  
**Session Moderator: Roger Wareham, Director Grants Development Office, University of Minnesota-Morris**

#### **Current Issues in Today's Research Environment and Implications for Research Administrators**

*Post-Award, Intermediate, Concurrent Session*

Analysis of five core findings of the report "The Current Health and Future Well-Being of the American Research University" and how we as research administrators can respond.

Learning Objectives:

- To become educated on the current issues in today's research environment.
- Initiate ideas of how we as research administrators can best support our faculty through current challenges in research.
- Share ideas of what has worked well at successful institutions and discuss how current challenges are changing the way we do business.

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*Amy Brusk, Grant Specialist, Kansas State University*

#### **The Ethics and Regulatory Landscape of Including Vulnerable Populations in Pragmatic Clinical Trials**

*Medical Compliance, Intermediate, Concurrent Session*

In this session we will discuss the categories considered vulnerable per the regulations, including the current regulations regarding vulnerable study subjects. There also will be a discussion regarding pragmatic clinical trials and a presentation on a different perspective on vulnerability. The presentation will provide recommendations for vulnerable subjects in pragmatic clinical trials.

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*Mary Jane Welch, Associate Vice President, Research Regulatory Operations; Associate Professor, College of Nursing, Rush University Medical Center*

### **Research Administration: The Next Generation**

#### ***Professional Development, Basic, Concurrent Session***

This session will discuss the impact of multiple generations in the workforce with a focus on environmental changes that will be needed as the millennial generation moves into leadership roles in research administration. We also will discuss how to attract, engage, and retain millennials in this job field.

Learning Objectives:

- Develop strategies for the recruiting, engaging, and retaining millennials in research administration.
- Identify changes that may be needed to the research administration culture and working environment for the new generation of research administrators.
- Incorporate working styles of multiple generations into the research administration workplace.

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**Becky Reynolds**, Director Medicine Research Administration, Indiana University-Purdue University Indianapolis  
**Tammy Good**, Associate Director of Finance, CTSI, Indiana University School of Medicine

### **A Fulbright Can Change Your Life**

#### ***International, Basic, Concurrent Session***

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

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**Brian Sajko**, Fulbright Ambassador

### **Funding Opportunities: The Recipe to Successful Proposal Development**

#### ***Pre-Award, Basic, Discussion Group***

If you know what you are looking for, funding opportunities and guidelines are the recipe for putting the right information in a proposal and knowing what to leave out. They are also the foundation for communication with the sponsor. However, there are however many layers to the comprehensive set of guidelines, and in this session we will discuss several sets of guidelines to demonstrate how to efficiently get the most out of the guidelines and avoid pitfalls.

Learning Objectives:

- How to efficiently use proposal guidelines and avoid pitfalls.
- How to use guidelines as a basis for communication with the sponsor.
- How to use guidelines to create timelines and submission checklists.

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**Julia Rodriguez**, Certified Research Administrator, University of Missouri-Columbia  
**Charlie Giese**, Senior Grant & Contracts Specialist, University of Wisconsin-Madison

### **Subcontract Process Improvement Pilot: Units, Systems, and Efficiencies**

*Post-Award, Advanced, Concurrent Session*

This session will describe a “subcontract pilot” that was developed to address a complex, high-risk, time-sensitive process. The lifecycle of a subcontract involves departmental, school, and central units, which includes the PI, department research administration, Office for Sponsored Research (OSR), and Conflict of Interest Office at proposal stage and award stage, and also department business administration and Accounting Services for Research and Sponsored Programs (ASRSP) during award management and closeout. Given the variety of units and systems involved with subcontracts, the process is complex and can be inefficient. Our program was initiated to bring together stakeholders from the various units to analyze current practices and jointly evaluate the processes for improvement.

Learning Objectives:

- Understand and streamline processes.
- Identify system solutions.
- Learn deliverables targeted to improve department involvement in the process.
- Develop resources, training materials, and quick guides to assist with all phases of the subcontract process.

Pre-Requisites:

- Participants should be familiar with some aspect of subcontract processing at their institutions.

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*Tyra Darville-Layne, Senior Subcontracts Manager, Northwestern University*

*Reid Wellensiek, Director of Research Administration, Northwestern University*

*Chris Moores, Assistant Director of Research Administration, Northwestern University*

### **International Projects: Challenges and Success...Keep Calm and Carry On**

*International, Basic, Concurrent Session*

Are you a research administrator who has established international collaborations with unique challenges? This session will discuss in-depth the many issues that can arise when working on international projects. We will discuss what has worked to help resolve issues with set up, budgeting, personnel, and other issues that may arise.

Learning Objectives:

- Understand how to navigate and manage research in unique international situations.
- Understand specific challenges with budgeting in an international situation.
- Share questions or challenges that you have encountered when working with an international collaborator.

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*Jennifer Klenke, DOLF Project Manager for Finance and Administration, Washington University in St. Louis*

*Heather Offhaus Director, Medical School Grant Review & Analysis, University of Michigan-Ann Arbor*

### **The IRB Black Hole: Tips to Reduce the Time a Protocol is Lost in Space**

*Compliance, Basic, Concurrent Session*

This session will provide tips for research administrators to use to help their staff navigate the IRB and reduce the amount of time protocols take to get approved.

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*John Schwartz, Director of Business Affairs, School of Criminal Justice, University of Cincinnati*

### **A Survivor's Guide to Shared-Service Centers After Implementation**

*Senior, Advanced, Concurrent Session*

This session will focus on lessons learned during the Shared Service Center (SSC) implementation at the University of Kansas. Speakers will share tactics and approaches for effective communication and feedback, sustaining and strengthening partnerships with campus stakeholders, and keeping employees engaged and motivated. Whether your campus is considering shared service centers or has already established them, discover how to communicate more effectively with stakeholders, reconcile their needs with realistic expectations, and survive and thrive in a shared service environment.

Learning Objectives:

- Identify campus stakeholders in SSC implementation.
- Share examples of ways to keep employees engaged, motivated, and connected to the institutional mission.
- Examine the limits of flexibility in SSC implementation.

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**Michelle Ginavan-Hayes**, Director-Engineering, Technology & Environment Shared Service Center, University of Kansas

**Amy Carlson**, Director-Pharmacy & Biomedical Research Shared Service Center, University of Kansas

**Pat Kuester**, Director-Campus Administration & Operations Shared Service Center, University of Kansas

**Cindy Nau**, Director-Education, Social & Biobehavioral Shared Service Center, University of Kansas

**Mark Reynolds**, Director of Finance & Planning-College of Liberal Arts & Sciences, University of Kansas

**Karla Williams**, Director-College & Professional Schools Shared Service Center, University of Kansas

### **Primer on Understanding and Negotiating Intellectual Property and Publication Language in Industry-Sponsored Research Agreements**

*Pre-Award, Intermediate, Concurrent Session*

This intermediate-level session will discuss intellectual property terms that are frequently used when dealing with an industry sponsor, what those terms mean, how they are used in agreements, and the strategies you can use to negotiate those out or make an informed decision with the PI on how to proceed. Focused on the pre-award, non-JD administrator, this session also will cover why publication rights are critical and common ways contract language is used to limit rights in publication. Specific examples will be provided.

Learning Objectives:

- Better understand commonly used terms related to intellectual property and their application in sponsored research.
- Identify problematic terms and conditions inhibiting publication rights and affecting ownership rights in IP.
- Employ negotiation strategies, including language samples that may satisfy both parties.

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**Chase Bunger**, Senior Compliance Manager, Office of Sponsored Programs Administration, University of Missouri

**Nancy Baker**, Senior Grants & Contracts Administrator, Office of Sponsored Programs Administration, University of Missouri

### **Mentoring Our Own (MOO): Be Outstanding in Your Field**

*Professional Development, Basic, Concurrent Session*

Have you been in research administration for a while and feel you have experience and “lessons learned” that could be useful to others? Perhaps you’re new to the field and would like to learn how others approach common tasks and challenges. The Mentoring Our Own (MOO) program helps connect Region IV members for just this purpose. Join us to learn about MOO, hear about members’ experiences as mentors or mentees, and learn how you can join the program.

Learning Objectives

- Provide an overview of the Region IV MOO program.
- Promote opportunities for additional mentors and mentees to get paired in MOO.
- Define expectations of mentors and mentees.
- Foster opportunities for mentors and mentees to meet.

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**Susan Grimes**, Assistant Director of Research Development Services, Purdue University

**Diane Hillebrand**, Grants & Contracts Officer, University of North Dakota; Chair-Elect, NCURA Region IV

3:00pm – 3:20pm **Spark Session**

### **Emotional Intelligence: The Sine Qua Non of Research Administration**

#### **General**

IQ has long held the reputation for determining an individual's success in life, but there are other factors that can have an equal or greater impact on an individual's future success. Research has found that what is often overlooked is the role that Emotional Intelligence plays in a person's ability to be effective and efficient. In the research administration environment, it is critically important to be aware of the role of emotions in day-to-day interactions with internal and external customers and to understand their ability to determine success or failure.

Learning Objective:

- Understand what Emotional Intelligence is and why it is important for research administrators.

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*Keron Hopkins, Grants and Contracts Administrator, University of Missouri-Kansas City*

4:00pm – 4:20pm **Spark Session**

### **Improving the Practice Plan Salary Process at Indiana University School of Medicine**

#### **Basic**

This is a brief discussion of how a partnership with the School of Informatics maximized cost savings while accomplishing a "stretch" goal of migrating a cumbersome reconciliation Excel-based system for practice plan salary recovery on contracts and grants to a web-based, user-friendly platform.

Learning Objective:

- Learn how to work within your institution to maximize efficiency without sacrificing your budget.

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*Gavyn Clasemann-Ryan, Associate Director of Research Administration, Indiana University*

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

### **eRA: What System Administrators Want You to Know**

#### **Post-Award, Basic, Concurrent Session**

eRA administrators often are the go-to persons for all things IT, so how does one cultivate their talents for the unique needs of research administration? Attendees will learn about key concepts in the modern IT world, including the difference between a data warehouse and a dashboard, the secret behind designing usable systems, and how to interact with your resident IT professional. This is an interactive session, so please bring your questions.

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*Elena Semyonova-Smith, Grants Officer, University of Kansas Center for Research*

*Robert Kerley, Director, Research Systems Support, University of Kansas Center for Research*

### **International Collaborations: Getting Past Fumbles, Stumbles, and Blunders to Success with Global Partners**

#### **International, Basic, Concurrent Session**

This session is geared toward smaller, undergraduate-serving institutions that are relatively new to international collaborations. The lead presenter will share her blunders, and her strategies, in working with international partners at the pre-award stage. Whether your institution has many international partners or a few, you are invited to share your fumbles, success stories, and the tools you use when working with global partners in order to ensure a successful proposal.

Learning Objectives:

- Identify key considerations when working with international partners.
- Construct a checklist for working with international partners at the pre-award stage.
- Share experiences and the tools used when working with international collaborators.

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*Tricia Callahan, Director Proposal Development, Office for the Advancement of Research & Scholarship, Miami University*

*Dawn Underwood, Associate Dean for Sponsored Programs, Indiana State University*

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

### **The Power of Protocols: How Standardized Protocols Can Help Your Office Improve Processes While Maximizing Efficiency**

*Predominantly Undergraduate Institution, Intermediate, Concurrent Session*

Many research administrators struggle to incorporate changes and improvements into their procedures while also ensuring that weekly, monthly, yearly, and other periodical tasks and processes are completed. Learn how a research administrator in an office of one at a primarily undergraduate institution uses self-developed “protocols” to maximize productivity while also integrating new ideas and enhancements.

Learning Objectives:

- Discover the benefits of having formalized protocols for your office.
- Begin developing protocols that will work for your office.

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*Sarah Ryan, Director of Grant Development, St. Norbert College*

### **Uncovering Partnership Opportunities with Community Colleges**

*Pre-Award, Basic, Concurrent Session*

As the nation's largest singly-accredited statewide community college system, Ivy Tech Community College is involved in many partnerships with four-year institutions for grant dollars. This session focuses on creating a dialogue about partnering with community colleges on grant proposals: what are the benefits of such a collaboration? What are some of the pitfalls to avoid? How can a community college presence on a grant proposal increase your institution's chances of being funded?

Learning Objectives:

- Become familiar with what community college partners can bring to a collaborative funding opportunity.
- Learn how partnerships with community colleges can make proposals more viable to funders.

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*Brian M. Thomas, Executive Director, Grants Office, Ivy Tech Community College of Indiana-Central Office*

*Lindsey Daugherty, Assistant Director, Grants Office, Ivy Tech Community College of Indiana-Central Office*

### **Creating Cross-Functional Process Diagrams and Standard Operating Procedures**

*Senior, Intermediate, Concurrent Session*

The essence of research administration is balancing customer service and compliance with ever-changing institutional and governmental requirements. This balancing act requires a full understanding of your processes and robust, well-written standard operating procedures. Cross-functional process diagrams, also called Swimlane Diagrams, help identify who does what, when, and where it goes after they've done their part. We will present the elements of cross-functional process diagrams and creating the standard operating procedures that underlie each step of the process. These tools help establish a critical foundation to ensure compliance and provide a roadmap for research administrators, researchers, and their staff.

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

*David Lynch, Consultant*

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

**Finding Your Presence: Based on Amy Cuddy’s Best-Selling Book**

***Professional Development, Basic, Overview***

Have you ever had a nerve-wracking challenge and immediately wished for a do-over? Maybe after a job interview or a difficult conversation? The very moments that require us to be genuine and commanding can instead cause us to feel phony and powerless. Too often we approach the biggest hurdles in our lives with dread, execute them with anxiety, and leave them with regret. Achieving presence is the key to being able to be at our best. This session is based on the best-selling book *Presence: Bringing Your Boldest Self to Your Biggest Challenges*.

Learning Objectives:

- Learn how we can achieve “presence” to liberate ourselves from fear in high-pressure moments, perform at our best, and connect with and empower others to do the same.

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**Tara E. Bishop**, CAE, Deputy Chief Executive, National Council of University Research Administrators; Certified Meditation Instructor, Chopra Center University

5:00pm – 6:00pm

**Newcomers Reception**

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

6:00pm – 9:00pm

**Dinner Groups**

*Sign-up near the Registration Desk to join other NCURA attendees and experience the local fare Kansas City has to offer. Dinner Groups will meet in the lobby at 6:00pm for reservations at nearby restaurants.*

9:00pm – Midnight

**Hospitality Suite**

*Located in the Rooftop Bar.*

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

## Tuesday, May 3

|                   |   |
|-------------------|---|
| 6:00am – 7:00am   | <b>Morning Yoga</b>                     |
| 7:00am – 5:00pm   | <b>Registration Desk &amp; Exhibits</b> |
| 7:00am – 8:30am   | <b>Continental Breakfast</b>            |
| 8:30am – 10:00am  | <b>Concurrent and Spark Sessions</b>    |
| 10:00am – 10:30am | <b>Morning Break</b>                    |
| 10:30am – 12:00pm | <b>Concurrent Sessions</b>              |
| 12:00pm – 1:15pm  | <b>Lunch and Business Meeting</b>       |
| 1:15pm – 2:15pm   | <b>Concept Expo Poster Session</b>      |
| 2:15pm – 2:45pm   | <b>Afternoon Break</b>                  |
| 2:45pm – 3:45pm   | <b>Concurrent and Spark Sessions</b>    |
| 4:00pm – 5:00pm   | <b>Concurrent and Spark Sessions</b>    |
| 5:00pm – 6:00pm   | <b>Line Dancing Lessons</b>             |
| 6:00pm – 10:00pm  | <b>Tuesday Night Event</b>              |

*Howdy pardners! Join us for a country-themed, rootin' tootin', foot-stompin' night. Bring your best cowboy/cowgirl attire. Not into country music or line dancing? Our DJ will play a variety for everyone to enjoy. We'll have a quieter area for conversation, too. Come hungry--heavy appetizers will be served.*

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

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

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



## Tuesday, May 3

- 6:00am – 7:00am      **Morning Yoga**  
*Join NCURA Region IV’s Bonniejean Zitske to start off your day right with a morning yoga session in Conference Suite 441. **Brand-new yogis welcome!** We will gather at 6:00am and begin with our opening meditation at 6:15am. Please bring a yoga mat or towel.*
- 7:00am – 5:00pm      **Registration Desk and Exhibits**
- 7:00am – 8:30am      **Continental Breakfast**
- 8:30am – 10:00am    **Concurrent and Spark Sessions**
- 8:30am – 8:50am      **Spark Session**

### Preparing for the CRA Exam

#### *Intermediate*

The session will help participants determine if they are ready to take the CRA Exam and how to best prepare for it.

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

### 8:30am – 10:00am    **Tuesday Concurrent and Spark Sessions**

### Cost Transfers – The Good, The Bad, and All Preventable

#### *Post-Award, Intermediate, Concurrent Session*

While there is no such thing as a good cost transfer, some are definitely more allowable than others, and some are sure to make the auditors smile with anticipation of some major findings. So, how do we differentiate between the two? And better yet, how do we prevent them altogether? In this session we will concentrate on what is considered a cost transfer, its causes, and possible consequences, as well as how to process them appropriately to mitigate damage. Most importantly, we will discuss the best practices aimed at minimizing and preventing cost transfers.

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*Elena Semyonova-Smith, Grants Officer, University of Kansas Center for Research, Inc.*

*Anita Abel, Assistant Director, Research Administration, Post-Award Services, University of Kansas Center for Research, Inc.*

### The Sustainability Challenge: Building Sustainability into Grant Project Design

#### *Predominantly Undergraduate Institution, Intermediate, Concurrent Session*

In their RFPs sponsors increasingly are requesting information about “sustainability.” They want to know what will happen to a project after the grant ends: will it grow, be maintained at current levels, continue on a reduced scale, or cease entirely? In this session you will learn about five types of sustainability and two core questions that must be answered when designing a sustainability plan. A case study activity will highlight sustainability considerations from the perspective of grant reviewers and, in turn, better prepare you to help your faculty answer the oft-dreaded question, “How will your project be sustained beyond the granting period?”

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

### **Overview of PCORI and the Application Process**

#### ***Medical Compliance, Basic, Concurrent Session***

Scott Solomon will provide an overview of the Patient-Centered Outcomes Research Institute (PCORI), including its mission, vision, and purpose. He will describe the differences between broad and targeted funding announcements (also known as PFAs) and related elements of PCORI funding. Kristen Metzger will discuss PCORI's application and Letter of Intent process, including programmatic requirements (completing required research plan and budget templates) and administrative requirements (formatting and submission guidelines). The presentation is intended for new research administrators (one year of experience) with little to no experience with PCORI.

Learning Objectives:

- Understand PCORI's history, vision, and mission.
- Understand PCORI's research portfolio and unique approach to funding research.
- Understand PCORI's application process.

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**Scott Solomon**, Director, Contracts Management and Administration, Patient-Centered Outcomes Research Institute  
**Kristen Metzger**, Communications Administrator, Contracts Management, Patient-Centered Outcomes Research Institute

### **The Senior-Level Research Administrator's Role as Viewed by Junior-Level Administrators**

#### ***Senior, Intermediate, Concurrent Session***

Senior-level colleagues sometimes forget what it was like to start out in research administration. Ok, sometimes they want to forget, but can't! Either way, they sometimes fail to understand what our less-experienced colleagues need in order to succeed and advance as research administrators. In this session, two junior- to mid-level research administrators will discuss what they expect/need/want/must have from senior administrators. They'll also discuss what they don't want or need, too! A seasoned veteran will describe what is needed from the up-and-coming junior research administrators. We'll touch on issues when you're in your office, as well as how this can be applied to NCURA activities. Hopefully, we'll send you home with some new insights that you can apply when communicating with your more- or less-experienced colleagues.

Learning Objectives:

- Understand how junior-level research administrators view their role in the larger organization.
- Better understand how a junior-level research administrator views the role of a senior-level research administrator.
- Learn tips and tricks for communicating with research administrators at levels other than your own.

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**James Maus**, Moderator, Research Administrator, Department of Orthopedic Surgery, Washington University in St. Louis  
**Bill Courtney**, Grant Specialist I, Division of Oncology, Washington University in St. Louis  
**Kurt McMillen**, Managing Officer, Office of Research & Sponsored Programs, University of Wisconsin-Madison

### **Crowdfunding: What is the Best Approach for Your Institution?**

#### ***Pre-Award, Intermediate, Discussion Group***

Crowdfunding has become a popular mechanism for raising funds to support projects that typically fall outside the usual funding channels. Using the power of "crowdsourcing," one can gather many small donations to support project goals. But this form of research funding raises many questions for university administrators wondering how to facilitate such projects. We will discuss questions related to the central administration of crowdfunding projects and issues that may arise in managing the crowdfunding campaigns. We also explore different institutional models and qualities of successful projects.

Learning Objectives:

- Understand the types of activities that might be best supported through crowdfunding.
- Understand the particular fundraising and compliance challenges that may arise in crowd-funded projects.
- Discuss the role of the sponsored research office in supporting these projects.
- Discuss different institutional approaches to managing crowdfunding projects and funds.
- Understand which qualities to seek in crowdfunding platforms for research projects.

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**Patience Graybill Condellone**, Grant Analyst, Washington University in St. Louis  
**Teri Gullede**, Research Administrator, Southern Illinois University Edwardsville

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

### **Research Administration and Policy Discussion**

*Predominantly Undergraduate Institution, Basic, Discussion Group*

This session will discuss university policies as they relate to research and sponsored programs. Topics include engaging the right people in policy discussions, obtaining administrative approvals, and translating policies into procedures that work.

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*Jeanie Neal, Director of Grants & Sponsored Programs, University of Indianapolis*

*Dawn Underwood, Associate Dean for Sponsored Programs, Indiana State University*

9:30am – 9:50am **Spark Session**

### **Instituting a Workplace Wellness Initiative in a Sponsored Projects Office**

*Basic*

Budget cuts, Uniform Guidance, audits, deadlines – these words immediately raise the stress level of any research administrator. Such prolonged stress can lead to workplace task errors, decreased productivity, disengagement, dissatisfaction, and lost work days. To address these negative effects, the Office of Research and Sponsored Programs at the University of Wisconsin-Madison developed and implemented a Wellness Initiative to reduce workplace stress and positively impact the health of staff. Our experience does not have to be unique!

Learning Objectives:

- Learn the seven dimensions of wellness as a holistic framework for thinking of well-being.
- Learn how to obtain leadership support for a Wellness Initiative.
- Learn strategies for developing a successful wellness program tailored to your office.

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*Jennifer Kuhr, CRA, Senior Grants & Contracts Specialist, Research & and Sponsored Programs, University of Wisconsin-Madison*

*Melanie Hebl, Education Coordinator, Research and Sponsored Programs, University of Wisconsin-Madison*

*Jessica Osiecki, Grants and Contracts Specialist, Research and Sponsored Programs, University of Wisconsin-Madison*

10:00am – 10:30am **Morning Break**

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

### **Successfully Moving Forward Together: Collaborative Post-Award Administration**

*Post-Award, Intermediate, Concurrent Session*

Now that the researchers are moving to collaborative research, it can leave research administrators finding their way through unfamiliar territory. Typically, each research area – and sometimes each unit within an organization – has its own ideas and procedures for post-award management, and at times it can seem like you are talking different languages. This presentation will focus on learning to how benefit from collaborative research administration while overcoming the inherent obstacles.

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*Julia Rodriguez, Certified Research Administrator, University of Missouri-Columbia*

*Marty Carter, Grants and Contracts Manager, School of Medicine, University of Missouri-Columbia*

### **IRB Reviewing and International Research**

*International, Basic, Concurrent Session*

This session will explore the regulations and ethics surrounding international research, ranging from student-based fieldwork to online surveys. We also will discuss strategies for the IRB to use in reviewing such research.

Learning Objectives:

- Learn various types and forms of international research.
- Understand common regulatory and ethical considerations with IRB review of international research.
- Share common IRB review practices of international research.

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*Elizabeth Buchanan, Director of Research Services, University of Wisconsin-Stout*

### **Research Administration According to Dr. Sheldon Cooper**

#### ***Compliance, Intermediate, Concurrent Session***

“The Big Bang Theory” is one of the most successful shows on television, and while the general public finds the show to be hilarious, those of us in research administration understand the comedy on a deeper level. That level is what we call reality. The characters’ antics have made us cringe on numerous occasions, from inappropriate use of government property to poor stewardship of sponsor funds. This session will highlight many of the characters’ on-screen policy violations and incidents of noncompliance while also examining the actual, real-life regulations involved. (This session was created by Anthony Ventimiglia, Justo Torres, and David Smelser, and is presented with their consent.)

Learning Objectives:

- Discover the programs available to increase faculty participation in proposal development.
- Highlight the on-screen scenarios related to research administration.
- Explain the real-world policy and regulation violations committed.
- Examine the long-term consequences should these violations take place within our institutions.

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**James Maus**, *Research Administrator, Department of Orthopedic Surgery, Washington University in St. Louis*

**Robert Aull**, *Director of Research Administration, Indiana University School of Medicine*

**Heather Offhaus**, *Director, Medical School Grant Review & Analysis, University of Michigan-Ann Arbor*

**Craig Reynolds**, *Director, Office of Research and Sponsored Projects, University of Michigan*

### **USDA Update (Videoconference)**

#### ***Government/Federal, Update, Concurrent Session***

The National Institute of Food and Agriculture (NIFA) is an agency within the U.S. Department of Agriculture (USDA) that replaced the former Cooperative State Research, Education, and Extension Service (CSREES). The Office of Grants and Financial Management (OGFM) supports NIFA’s mission to advance food and agricultural science by administering grants, cooperative agreements, and other federal financial assistance with policy, funding, and oversight. This session will provide participants with the opportunity to meet OGFM staff and learn more about NIFA and its financial assistance efforts.

Learning Objectives:

- Understand upcoming changes to NIFA policies and procedures.
- Learn about current and future NIFA budgets and agency priorities.

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**Lisa Scott-Morring**, *Policy Branch Chief, Policy and Oversight Division*

**Cynthia Montgomery**, *Deputy Director, Office of Grants and Financial Management*

**Erin Daly**, *Senior Policy Advisor, Office of Grants and Financial Management*

**Melanie Krizmanich**, *Senior Policy Specialist, Policy and Oversight Division*

### **The Challenges of Collaborating With National Labs (Affiliates and Non-Affiliates)**

#### ***Pre-Award, Advanced, Concurrent Session***

This interactive session will provide insight into the types of agreements and collaborations universities can have with DOE National Laboratories. Iowa State University and the University of Chicago enjoy affiliations with DOE National Labs, and the sharing of faculty, graduate assistants, and facilities can present unique challenges. Non-affiliated universities also work with DOE National Labs and have learned that not all National Labs are created equal! Listen to examples of our different relationships and learn how we worked through administrative challenges. Share your own experiences, as well!

Learning Objectives:

- Learn about the various contractual relationships that can exist between a university and a National Laboratory.
- Discover new insights for working through the myriad of administrative challenges brought on by the trend in increased collaborations and joint appointments.

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**Joanne Altieri**, *Research Contract Officer, University of Kansas Center for Research, Inc.*

**Laura Lindley**, *Assistant Director Pre-Award and Grants Management, University of Chicago*

**Becky Musselman**, *Director Office Sponsored Programs Administration, Iowa State University*

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

### Is It Cost-Sharing?

#### *Pre-Award, Basic, Discussion Group*

A round-table discussion regarding cost-sharing. Several examples will be provided for discussion. Participants are encouraged to bring their own examples from the trenches to review.

Learning Objectives:

- Define cost-sharing and understand the different types.
- Better determine when something is or is not cost-sharing based on phrasing.
- Rework possible cost-share scenarios into non-cost-share scenarios.

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*Kathie Veach, Manager for Research Administration, University Library, University of Illinois*

*Kathy Dams, Director of Grants Administration and Research Operations, Carle Foundation Hospital*

11:00am – 11:20am **Spark Session**

### Pre-Award Subrecipient Monitoring

#### *Intermediate*

Proper identification of subrecipients and third-party contractors according to specified definitions is a crucial first step to complying with the Uniform Guidance. Participants in this Spark session will be able to correctly categorize third parties as either subrecipients or contractors, and will identify best practices for assessing subrecipient risk prior to award.

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*Nancy Biles, Associate Director Pre-Award, University of Kansas Center for Research, Inc.*

*Ashley Coles, Research Contract Officer, University of Kansas Center for Research, Inc.*

*Daniel Coonfield, Grant Officer, University of Kansas Center for Research, Inc.*

12:00pm – 1:15pm

### Lunch and Business Meeting

*Come hear about the latest Region IV activities. All are welcome to attend and participate in the conversation, but only current members are invited to vote.*

1:15pm – 2:15pm

### Concepts Expo Poster Session

### Concepts Expo Poster Session

This is the Region's first-ever poster session, providing colleagues with a platform to share ideas, theories, and fixes in a relaxed networking environment.

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- **Leveraging Community College Partnerships**  
*Lindsay Daugherty and Brian Thomas, Ivy Tech Community College of Indiana*
  - **Leveraging System Workflow to Support Turnaround Time Metrics**  
*Kim Griffin, Northwestern University*
  - **Targeted Faculty Training to Increase Sponsored Projects**  
*Tara Gregg and Mari Tucker, Washburn University*
  - **Focus on Compliance**  
*Tara Gregg and Mari Tucker, Washburn University*
  - **Cost Sharing? Proceed With Caution**  
*Brad Bernet and Megan Todd, University of Kansas Center for Research, Inc.*
  - **Subrecipient vs. Contractor: Decisions and Documentation**  
*Nancy Biles and Dan Coonfield, University of Kansas Center for Research, Inc.*

1:15pm – 2:15pm

### Concepts Expo Poster Session

- **Leadership Styles in the Face of Compliance Changes and Demands**  
*Lynn Maurer, Indiana State University*
  - **Shared Responsibilities: A Shared-Service Approach for Grants Management**  
*Christopher Day and Amy Butala, The Ohio State University*
  - **Emotional Intelligence: The Sine Qua Non of Research Administration**  
*Keron Hopkins, University of Missouri-Kansas City*
  - **Instituting a Workplace Wellness Initiative in a Sponsored Projects Office**  
*Jennifer Kuhr, Melanie Hebl, and Jessica Osiecki, University of Wisconsin-Madison*
  - **Improving the Practice Plan Salary Recovery Process at Indiana University School of Medicine**  
*Gavyn Clasemann-Ryan, Indiana University School of Medicine*
  - **Managing the Bells and Whistles of your NIH Grants.gov or ASSIST Applications (Or, “You Do, In Fact, Have to Sweat the Small Stuff”)**  
*Brenda Leuenberger, University of Missouri*
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2:15pm – 2:45pm **Afternoon Break**

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

### Stop the Insanity! Build a Better Financial Management System

*Post-Award, Intermediate, Concurrent Session*

Tired of running 10 reports to prepare for meeting with faculty? Spending your days answering the question “How much money is left?” Don’t have a clue how to answer that question when a staff member is on vacation? This session will provide a roadmap for using Access and Excel to pull information together from your financial system and other data sources to improve the quality of your life working in post-award. Provide answers to faculty for what-if scenarios instantly.

Learning Objectives:

- Understand the potential tools you already have on your desktop.
- Obtain actual programming code that you can use at your institution.

Prerequisites:

- Knowledge of enterprise-level financial systems.
  - Intermediate-level knowledge of Excel and familiarity with Access.
  - Knowledge of VBA helpful.
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*Renie Hagensen, Grants Manager, University of Nebraska-Lincoln*

*Janet Renoe, Grants Specialist, University of Nebraska-Lincoln*

### Intercultural Communication: Research Administrators in a Global Environment

*International, Basic, Concurrent Session*

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

Learning Objectives:

- Identify cultural differences that contribute to communication challenges.
  - Learn about low-context and high-context cultures.
  - Determine how you feel about communicating in different ways.
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*Jeremy Miner, Director of Grants and Contracts; University of Wisconsin-Eau Claire*

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

### **It's Not Me, It's YOU: Managing Personality Differences in Research Administration**

*Professional Development, Basic, Concurrent Session*

As a new research administrator you will likely have the benefit and the challenge of working with a diverse group of individuals at your institution. There is much to learn about policies and procedures; however, often one of the greatest challenges is working with the variety of personality types within your team, department, or institution. Understanding how to interact with diverse personalities will ease your transition into this role. Our presenters will discuss personality types as related to research administration roles and how to effectively manage tasks to accomplish mutual goals.

Learning Objectives:

- Identify common personality types, challenges, benefits to each type.
- Discuss examples and effective strategies.
- Present proactive approaches to research.

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*Sandra Logue, Administrator, Center for Neurosciences, University of Colorado; Chair-Elect, NCURA Region VII*

*Diane Hillebrand, Grants & Contracts Officer, University of North Dakota; Chair-Elect, NCURA Region IV*

### **Beyond the Matrix: Skillful Functions to Conquer Your Workload**

*Professional Development, Intermediate, Concurrent Session*

The presenters will demonstrate more tips and hints for using OneNote and Excel to work smarter and more efficiently.

Learning Objectives:

- Learn about tools available in OneNote that make managing the multitude of meetings easier.
- Learn several functions and features in Excel which will increase your efficiency in pre- and post-award activities.

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*Diane M. Meyer, Pre-Award Project Manager, Engineering Research Institute, College of Engineering, Iowa State University*

*Jamy Rentschler, Program Manager, Vice President of Research, Iowa State University*

### **Planning for Retirement: Pros, Cons, and Logistics**

*Senior, Basic, Concurrent Session*

If you hope to retire before you expire, you need a plan. In this interactive session we'll consider America's ever-changing image of retirement and its influence on individual decisions; staff retirement plans common to universities and research institutions; vesting; retirement calculators; health insurance and Social Security; early retirement, semi-retirement, and succession planning; and lame-duck status, or staying in the harness as long as you want via protections afforded by the Age Discrimination in Employment Act (ADEA). Come prepared to discuss your own plans or concerns about a lack thereof--like so many issues we've faced in a research administration career, they're more manageable when assailed by a team.

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*Robert Aull, Director of Research Administration, Indiana University School of Medicine*

### **Necessity for Financial Research Reporting at the Department Level**

*Post-Award, Advanced, Discussion Group*

How do we use financial reports relative to the research enterprise in our departments? Do they only describe the current state, or do they help determine the future state? How does financial reporting help a PI make decisions about their research program? How do such reports help protect the department from the financial risk associated with a PI's failing research program? In this session we will bring to light the processes and purposes for financial reporting at the department level and provide a discussion platform for the various mechanisms of such reporting. Come prepared to share!

Learning Objectives:

- Understand why it is necessary to keep Principal Investigators informed about their finances.
- Discuss particular items that we review with PIs, including finances, audit risk, and right-sizing labs, etc.

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*Loretta Bassler, Research Administrator, University of Iowa*

*Keith Page, Director, Finance & Administration, Center for Genome Sciences & Systems Biology, Washington University*

3:00pm – 3:20pm      **Spark Session**

### **Cost-Sharing**

#### **Intermediate**

The Uniform Guidance has changed how sponsors and institutions share the costs for sponsored projects. A coherent institutional cost-sharing policy can clarify when cost-sharing is appropriate and how it should be proposed and tracked, and when it should be de-quantified or removed from proposal budgets. The purpose of this Spark Session is to promote discussion of Pre-Award cost sharing issues and the approaches found at different research institutions to ensure compliance with the Uniform Guidance.

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**Brad Bernet**, *Grant Officer, University of Kansas Center for Research, Inc.*

**Megan Todd**, *Grant Officer, University of Kansas Center for Research, Inc.*

4:00pm – 4:20pm      **Spark Session**

### **From SPARK to Fire: Growing Your Involvement With NCURA Region IV**

#### **Basic**

Many members ask how they can get more involved with NCURA. This Spark Session will provide information on a variety of opportunities, including performing various tasks at meetings; presenting at regional and/or national meetings; serving on a committee; serving as a Mentor or a Mentee in the MOO program; or running for a position on the Board of Directors. Not only does your participation help keep our organization strong, it also is a great way to meet more people in the Region IV family and to grow professionally. Join us and learn more about these great opportunities!

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**Sue Grimes**, *Assistant Director Research Development, Purdue University*

**Andrea Marshall**, *Principal Grant Administrator, University of Minnesota*

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

### **How Indiana University Uses Data Analytics to Verify Expenses Are Reasonable, Allowable, and Allocable on Federal and Federal Pass-Thru Awards**

#### **Post-Award, Intermediate, Concurrent Session**

How do you determine if an expense is allowable? This session will provide the process and tools that Indiana University (IU) uses to facilitate the correct classification of charging expenses to federal and federal pass-thru grants. IU uses predefined queries to download data into spreadsheets, then uses Excel spreadsheets to help verify the expenses charged to the grant are reasonable, allowable, and allocable.

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**Jim Engel**, *Director Grants Admin Finance & Operations, Indiana University*

### **Assessment and Risk Mitigation of International Subawardees**

#### **International, Basic, Concurrent Session**

Having a local partner in the country you are working in can be a useful and efficient method for completing a project, but deciding who you will work with and the level of monitoring required can be an important part of ensuring you can complete the work within budget. We will discuss methods of reviewing administrative and financial capacity of an organization and how various scenarios may affect pre-award planning and budget, as well as strategies for subaward monitoring during the award.

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**Chris Dillon**, *Financial Deputy Director USAID OWH Project, University of Minnesota*

**Derek Krogstad**, *Senior Grant Administrator University of Minnesota*

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

### **Adding It All Up: Creating Budgets for Grant Proposals**

*Predominantly Undergraduate Institution, Basic, Concurrent Session*

This session will discuss how to create a reasonable and responsive budget and budget justification. We will review allowable and unallowable costs, cost-sharing, and indirect costs as applied to both federal and foundation proposals. We also will discuss how to write an effective budget narrative.

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

### **Getting Involved with NCURA**

*Professional Development, Basic*

NCURA is a rich and vibrant community with programs and services to support your career as a research administrator, as well as benefit your institution. Opportunities range from training offered year-round to volunteering within the organization to help further the profession. Come hear about all NCURA has to offer!

Learning Objectives:

- Learn about programs, resources, and services offered by NCURA.
- Learn about regional and national volunteer opportunities.

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*Tara Bishop, CAE, Deputy Chief Executive, National Council of University Research Administrators*

*Heather Offhaus, Director, Medical School Grant Review & Analysis, University of Michigan-Ann Arbor*

*Kirsten Yehl, Administrative Director, Northwestern University*

### **Institutes and Centers: Are They Really So Unique?**

*Senior, Advanced, Discussion Group*

At a glance, research administration in a center setting may look just like research administration in a department. Delve deeper, and you'll find that centers are a different reality. Centers are often caught between departments and divisions, and have a unique set of considerations and issues. We will discuss the different types of centers, the unique nature of centers, common pitfalls, and potential solutions for some of the most common center research administration issues.

Learning Objectives:

- Have a clear understanding of key differences between departments and centers or institutes.
- Identify main challenges with overseeing a center or institute.
- Acquire potential strategies for overseeing a center or institute.

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*Kristin T. Harmon, Grants Administrator, Wisconsin Institute for Discovery, University of Wisconsin-Madison*

*Keith Page, Director, Finance & Administration, Center for Genome Sciences & Systems Biology, Washington University*

### **Knowing the Basics: Fundamentals of Grant Proposal Development**

*Pre-Award, Basic, Discussion Group*

This session discusses the basic fundamentals needed to help novice faculty members develop proposals for externally funded projects. We will discuss the barriers that hinder faculty from participating in sponsored programs and dismantle a few by (1) demystifying the idea that "they can't write a grant because they don't know how or have never written before", providing guidance regarding university protocols, budget development, and submission; (2) discussing how to establish a team-oriented relationship between research administration staff and the faculty – a clear definition of each party's roles and responsibilities, review of guidelines, establishing timelines and providing guidance regarding policies; (3) motivating faculty through each step of the proposal process through submission, soliciting confidence in their expertise.

Learning Objectives:

- Learn best practices that facilitate faculty buy-in for becoming involved with externally funded projects.
- Learn easy how-to steps that will help faculty understand the proposal development process.
- Obtain motivational strategies to use in your role as a research administrator at an institutions of higher education.

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*Tameika Morris, Grants Coordinator, Southeast Missouri State University*

5:00pm – 6:00pm

**Line Dancing Lessons**

*Join Diane Hillebrand for some quick line dancing lessons in Conference Suite 441 so you can kick up your heels at the Tuesday Night Event!*

6:00pm – 10:00pm

**Tuesday Night Event**

*Howdy pardners! Join us for a country-themed, rootin' tootin', foot-stompin' night. Bring your best cowboy/cowgirl attire. Not into country music or line dancing? Our DJ will play a variety for everyone to enjoy. We'll have a quieter area for conversation, too. Come hungry--heavy appetizers will be served.*

9:00pm – Midnight

**Hospitality Suite**

*Located in the Rooftop Bar.*

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

## Wednesday, May 4

- 6:00am – 7:00am      **Morning Yoga**
- 7:00am – 8:30am      **Hot Buffet Breakfast and Closing Remarks**
- 8:00am – 10:00am      **Registration Desk**
- 8:30am – 10:00am      **Concurrent and Spark Sessions**
- 10:00am – 10:30am      **Morning Break**
- 10:30am – 11:45am      **Concurrent Sessions**
- 11:45am      **Adjourn**  
*Safe travels home! Join us at the next Spring Meeting in  
Madison, Wisconsin, April 23-26, 2017!*

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



## Wednesday, April 30

- 6:00am – 7:00am **Morning Yoga**  
*Join NCURA Region IV's Bonniejean Zitske to start off your day right with a morning yoga session in Conference Suite 441. **Brand-new yogis welcome!** We will gather at 6:00am and begin with our opening meditation at 6:15am. Please bring a yoga mat or towel.*
- 7:00am – 8:30am **Hot Buffet Breakfast and Closing Remarks**
- 8:00am – 10:00am **Registration Desk Open**
- 8:30am – 10:00am **Concurrent and Spark Sessions**

### NIH Fundamentals

#### *Pre-Award, Basic, Concurrent Session*

Learn about the basics of the NIH extramural research process. The NIH grant life cycle is complex from submission, to award, to reporting, to close out. New research administrators often feel they need a road map to navigate all the steps. This session will provide the basics about NIH, from a brief history and structure to best practices. We'll also provide a basic overview of the grant mechanisms, processes, and systems and forms useful throughout the grant life cycle.

Learning Objectives:

- Understand the NIH organization and history.
- Understand how the grant process works for NIH extramural applications.
- Understand the agency numbering system, vocabulary, specific forms, and NOA.
- Understand resources and sponsor systems.

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*Charlie Giese, Senior Grants and Contract Specialist, University of Wisconsin-Madison*

### Research Infrastructure and NIH BRAD: Proposal Development to Implementation

#### *Pre-Award, Intermediate, Concurrent Session*

Research administrators work diligently to help faculty and staff to fulfill principal investigator roles and responsibilities for external funding. But what happens if sponsored offices seek external funding to further their missions? This session will review the NIH Biomedical/Biobehavioral Research Administration Development (BRAD) G11 Extramural Associate Research Development Award (EARDA) and one emerging institution's development of the proposal and implementation of the award. Discussion will include how the Office of Research and Projects developed the proposal and devised a management plan. The session will also include information on the first two years of implementation and lessons learned.

Learning Objectives:

- Forging relationships to implement a plan for seeking and managing external funding in a sponsored programs office.
- Using programs for research infrastructure:
  - Leveraging funding opportunities both internally and externally.
  - Facilitating collaborations internally, regionally, and nationally.
- Discussing lessons learned and best practices.

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*Teri L. Gulledege, Research Administrator, Office of Research & Projects, Southern Illinois University Edwardsville*

*Lisa Lawrence, Pre-Award Specialist, Office of Research & Projects, Southern Illinois University Edwardsville*

### Luddites Unite! Getting Technology to Work for You

#### *Senior, Basic, Concurrent Session*

This presentation will showcase various forms of technology that can help research administrators improve their work. This session is meant to assure those who are technology-impaired that technology can help if you let it! Demonstrated technologies will range from social media to workflow help.

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*Rebecca Hutchinson, Assistant Director, Research Contracts & Awards, University of Notre Dame*

*Nicole Nichols, Research Administrator, Washington University in St Louis*

8:30am – 10:00am **Concurrent and Spark Sessions**

### **But I'm Not Exporting Anything!: Export Control from the Sponsored Programs Perspective**

**Compliance, Basic, Concurrent Session**

This session is an interactive, case study-based approach to teaching export compliance integration. After a brief overview of federal export control regulations, speakers will present a multi-part, real-life sponsored projects scenario. Participants will be challenged to identify, discuss, and respond to the various compliance issues embedded within the scenario. Such issues include; foreign sponsors/nationals/ collaborators, travel, shipping, fundamental research, restricted parties, FCPA and anti-boycott terms. The session is presented by a Sponsored Projects Officer and an Export Compliance Officer who each address the way they might approach the issues presented. The speakers also talk about best practices for facilitating communication among parties, and offer suggestions for helping researchers and colleagues identify and understand export compliance requirements. Participants are encouraged to ask questions, discuss their approach, and offer their own experiences and best practices. Geared toward department administrators, grants managers and sponsored programs staff.

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*Laurie Rosenberg, Senior Sponsored Program Officer, The Ohio State University*

*Laurel Dean, Associate Director & Export Compliance Officer, The Ohio State University*

### **Patient-Centered Outcomes Research Institute (PCORI): Navigation Strategies**

**Medical Compliance, Basic, Discussion Group**

Since its inception a few years ago, everyone has been talking about PCORI, the Patient Centered Outcomes Research Institute. So many of our investigators are interested in applying, and we want to support them. But have you looked at the PCORI proposal guidelines and been completely daunted? If so, this session is for you! In this discussion group we'll walk through a PCORI application together to review application guidelines, discuss tips and tricks to manage the pre-award application and post-award management, and discuss the unique challenges posed by stakeholder engagement and patient-centered outcomes research. Attendees are encouraged to share their questions and experiences and to brainstorm strategies as a group to better navigate the process going forward.

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*Bethany Ekesa, PCORI Ambassador, Senior Research Administrator, Institute for Public Health and Medicine, Northwestern University*

### **Subrecipient Risk Assessments: What Have We Done and What Have We Learned?**

**Post-Award, Intermediate, Discussion Group**

This discussion group will focus on lessons learned from implementing Uniform Guidance requirements on subrecipient risk assessments. Presenters will share the risk assessment tools they use and provide a copy of the FDP risk assessment tool. Participants should come prepared to discuss their own risk assessment tools and processes. We will discuss questions such as: What issues have you encountered in performing risk assessments? How does your institution connect risk to monitoring? How should we plan to monitor subrecipients identified as medium- or high-risk? How can we keep issuing subawards in a timely manner while meeting these requirements?

Learning Objectives:

- Share information about risk assessment tools and resources.
- Help participants identify potential risks.
- Discuss options for mitigating potential risks.

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*Tyra Darville-Layne, Senior Subcontracts Manager, Contracts Officers, Northwestern University*

*Robert Gratzl, Managing Officer, University of Wisconsin-Madison*

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

9:00am – 9:20am **Spark Session**

### **Targeted Faculty Training to Increase Sponsored Projects**

**Basic**

Faculty members at predominantly undergraduate institutions like Washburn University may require targeted support and training in sponsored project development. The need for faculty equipped with the skills to identify, pursue, and submit competitive proposals has increased as part of achieving strategic institutional goals. After a needs assessment survey, Washburn's Office of Sponsored Projects developed a diverse training program covering each stage of proposal development that has helped to increase faculty participation and preparedness for developing competitive proposals. Trainings have included a variety of formats and incentives, which will be covered in this session.

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**Tara Gregg**, *Sponsored Projects Specialist, Washburn University*

**Mari Tucker**, *Director Office of Sponsored Projects, Washburn University*

10:30am – 10:50am **Spark Session**

### **Compliance Efforts During the Grant Life Cycle**

**Basic**

Educating Principal Investigators in all aspects of sponsored project compliance, both fiscal and programmatic, can be a daunting task. Particularly at predominantly undergraduate institutions (PUIs), faculty who do not conduct scientific research may have limited experience with sponsored project compliance. While the PIs are very successful in implementing sponsored project activities, the OSP was challenged to integrate compliance regulations into the PIs responsibilities and to provide training and support for monitoring compliance. The session will provide details on the OSP's targeted campaign to identify potential areas of difficulty and develop processes/procedures to ensure compliance.

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**Mari Tucker**, *Director Office of Sponsored Projects, Washburn University*

**Tara Greg**, *Sponsored Projects Specialist, Washburn University*

10:30am – 11:45 **Concurrent Sessions**

### **Tips on Preparing Multi-Institutional Proposals (or How to Make a Complicated Job Easier)**

**Pre-Award, Intermediate, Concurrent Session**

In this session participants will share key tips for successfully completing multi-institutional, multi-discipline proposals that participants will be able to use during the preparation of future proposals.

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**Deborah Epps**, *Research Grants Coordinator, Department of Orthopedic Surgery, Medical College of Wisconsin*

**Diane Meyer**, *Pre-Award Project Manager, Engineering Research Institute, College of Engineering, Iowa State University*

### **Exchange, Not Obstruction: Central vs. Departmental Research Administration**

**Pre-Award, Intermediate, Concurrent Session**

Administrators from central and departmental administration will team up with an administrator with cross-over background to discuss differences in roles and responsibilities, and the ways we can make each other's lives easier/improve the functioning of the team. This session provides insight for those considering a switch between central and departmental roles, and greater understanding of the interdependence of the two roles.

Learning Objectives:

- Understand the roles and responsibilities of central and departmental administrators.
- Understand the interdependence of central and departmental administrators.
- Understand how central and departmental administrators can best support each other's roles.

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**Kristin T. Harmon**, *Grants Administrator, Wisconsin Institute for Discovery, University of Wisconsin-Madison*

**Diane Domanovics**, *Assistant Vice President for Sponsored Projects, Case Western Reserve University*

### **Check-Mate (Yes, You Need a Good Checklist, Matie)**

**Post-Award, Basic, Concurrent Session**

As we are working on increasing the research base at a time of decreasing resource availability, we need to think how to do things smarter, not harder, and we need to do better with less. The classic maxim of “Less is More” comes immediately to mind. But “Less” of what and “More” of what? Spend less time and fewer resources while providing an impeccable service. What does it mean to you? Simplify, document, and train. This is where a GOOD checklist becomes indispensable. In this session we’ll discuss how to prepare the best checklist to fit your processes and purposes.

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**Elena Semyonova-Smith**, Grants Officer, University of Kansas Center for Research

**Cheryl Lyons**, Research Administrator Internal Medicine Molecular Oncology, Washington University in St. Louis

### **Seeding Research and Cultivating Grants at a PUI**

**Predominantly Undergraduate Institution, Basic, Concurrent Session**

Faculty at Predominantly Undergraduate-serving Institutions (PUIs) traditionally have heavy teaching/advising loads and little to no set-aside time for research. Additionally, the expectations to engage in sponsored activities at a PUI are often low. How then can we encourage and incentivize faculty while cultivating an environment that leads to faculty engaging in extramural grant activities at a PUI? Come learn what one PUI and one emerging research institute are doing to engage faculty, seed research, and cultivate a grant environment.

Learning Objectives:

- Identify obstacles faculty from PUIs and ERIs face when engaging in sponsored research.
- Select strategies and incentives for engaging faculty in research at your institution.
- Share tools used to engage faculty in sponsored research activities at your institution.

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**Tricia L. Callahan**, Director Proposal Development; Office for the Advancement of Research & Scholarship, Miami University

**Teri L. Gulledege**, Research Administrator, Office of Research & Projects, Southern Illinois University Edwardsville

**Lisa Lawrence**, Pre-Award Specialist, Office of Research & Projects, Southern Illinois University Edwardsville

### **Research Participant Incentives**

**Compliance, Intermediate, Discussion Group**

This discussion session enables participants to compare notes and experiences regarding the reimbursement of research study participants. Topics include (but are not limited to) methods for reimbursing participants; institutional policies and procedures; roles and responsibilities (including the role of the IRB); and circumstances under which the collection of Social Security Numbers can be waived.

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**Bill Sharp**, Assistant Director, Research Administration, University of Kansas

**Kevin Teel**, Business Manager, Fiscal Affairs, University of Kansas

### **Choosing a Career Path in Research Administration: Path? What Path?**

**Professional Development, Basic, Discussion Group**

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

Learning Objective:

- Increased understanding of career path options.

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**James Maus**, Research Administrator, Department of Orthopedic Surgery, Washington University in St. Louis

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

## Program Committee

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

|                                       |   |  |
|---------------------------------------|---|--|
| <b>Program Chair/Chair-Elect</b>      | Diane Hillebrand  | <i>University of North Dakota</i>  |
| <b>Program Co-Chairs</b>              | Michelle Ginavan-Hayes<br>Shannon Sutton                              | <i>University of Kansas<br/>Western Illinois University</i>                                    |
| <b>Marketing Team</b>                 | Katherine Durben<br>Patience Graybill Condellone<br>Tracy Mrowczynski | <i>Marquette University<br/>Washington University in St. Louis<br/>Northwestern University</i> |
| <b>Workshops</b>                      | Jaime Caldwell  | <i>University of Kansas Medical Center<br/>Research Institute</i>                              |
| <b>Track Leaders</b>                  |   |  |
| <b>Governmental/Federal</b>           | Shannon Sutton  | <i>Western Illinois University</i>   |
| <b>International</b>                  | Jeremy Miner  | <i>University of Wisconsin-Eau Claire</i>  |
| <b>Post-Award</b>                     | Nancy Reidelberger  | <i>Washington University in St. Louis</i>  |
| <b>Pre-Award</b>                      | Charlie Giese   | <i>University of Wisconsin-Madison</i>   |
| <b>PUI</b>                            | Jeff Ritchie  | <i>Lewis University</i>  |
| <b>Professional Development</b>       | Lucille Morgan  | <i>National Louis University</i>   |
| <b>Senior</b>                         | Jim Maus  | <i>Washington University in St. Louis</i>  |
| <b>Spark Sessions</b>                 | Sue Kelch   | <i>University of Michigan</i>  |
| <b>Concepts Expo</b>                  | Patience Graybill Condellone  | <i>Washington University in St. Louis</i>  |
| <b>A/V Coordinators</b>               | Aaron Crim<br>Diane Meyer   | <i>University of Kansas<br/>Iowa State University</i>  |
| <b>Registration</b>                   | Bonniejean Zitske<br>Sue Grimes                                       | <i>University of Wisconsin-Madison<br/>Purdue University</i>                                   |
| <b>Dinner Groups Coordinator</b>      | Alicia Reed   | <i>University of Kansas</i>  |
| <b>Evaluations Coordinator</b>        | Maura Cleffi  | <i>Northwestern University</i>   |
| <b>Guidebook Coordinator</b>          | Kimberly Griffin  | <i>Northwestern University</i>   |
| <b>Hospitality Coordinator</b>        | Robert Aull   | <i>Indiana University School of Medicine</i>   |
| <b>Newcomers Reception</b>            | Tamika Morris   | <i>Southeast Missouri State University</i>   |
| <b>Registration Coordinators</b>      | Sue Grimes<br>Bonniejean Zitske                                       | <i>Purdue University<br/>University of Wisconsin-Madison</i>                                   |
| <b>Sponsor/Vendor Coordinator</b>     | Laura Lindley   | <i>University of Chicago</i>   |
| <b>Regional Volunteer Coordinator</b> | Andrea Marshall   | <i>University of Minnesota</i>   |
| <b>National Volunteer Coordinator</b> | Connie Motoki   | <i>Washington University in St. Louis</i>  |
| <b>Program Document</b>               | Michelle Schoenecker  | <i>University of Wisconsin-Milwaukee</i>   |
| <b>Webmaster/Photographer/Artist</b>  | Rebecca Hutchinson  | <i>University of Notre Dame</i>  |



## 2015-2016 Officers and Board Members

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### Regionally Elected Representative to the NCURA Board

**Craig Reynolds**

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