51st NCURA Region IV Spring Meeting

MILES APART, CLOSE AT HEART

SIOUX FALLS, SD 2023

April 30th – May 3, 2023

Sioux Falls, South Dakota

2023 Sioux Falls Program Committee

Program Chair	**Julie Olivero**	**University of Michigan**
Program Co-Chair	**Amanda Gibbs**	**The Ohio State University**
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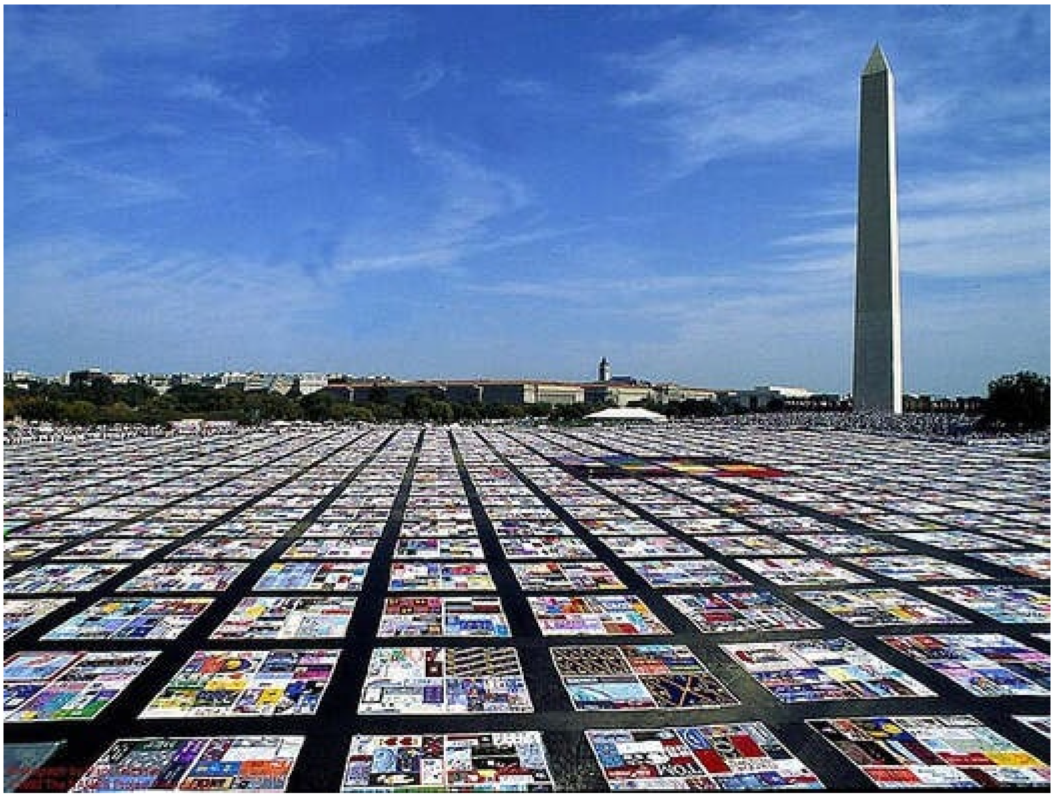
Pre-Award; Data/Metrics/eRA	**Amanda Gibbs**	**The Ohio State University**
Post-Award/Financial	**Sandy Fowler**	**University of Wisconsin-Madison**
Federal	**Dorothy Johnson**	**University of Wisconsin-Madison**
	Jennifer Rodis	**University of Wisconsin-Madison**
Departmental	**Georgetta Dennis**	**Attain Partners**
Compliance/Industry	**Michele Kennett**	**University of Missouri**
Professional/Personal Development; Leadership	**Jamie Caldwell**	**University of Missouri**
PUI	**Charlotte Whited**	**Carleton College**
	Erica Kennedy	**John Carroll University**
Spark Sessions/Breakfast Roundtables	**Nancy Reidelberger**	**Washington University in St. Louis**
Concepts Expo	**Crystal James**	**Medical College of Wisconsin**
Entertainment Coordinator	**Susan Holden**	**University of North Dakota**
Dinner Group Coordinator	**Ronda Hinsch**	**Avera Health**

NCURA Region IV Podcast Club

Wednesday morning at 9am!



This year we're trying something new. For those of you who enjoyed the book club, we're taking it into the future by holding the very first NCURA Region IV Diversity, Equity, and Inclusion Podcast Club! The 2023 session of the DEI Podcast Discussion Club will explore various themes of science, history and ethics surrounding HIV/AIDS. We will be discussing each of the podcasts below. Please feel free to listen to all of them, pick and choose, or to simply come and join in the discussion—all are welcome.

This Podcast Will Kill You: HIV/AIDS – Apathy Will Kill You

Boghuma Kabisen Titanji: Ethical Riddles in HIV Research

Queer America: The AIDS Epidemic, Then and Now

Bedside Rounds: The Original (Antigenic) Sin

For more information, including links to each podcast, please visit our DEI Podcast Club page at http://ncuraregioniv.com/podcast-club.html

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. Information on how to request attendance verification will be provided in the full program.

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.

Thank you to our meeting sponsors!

DAKOTA STATE UNIVERSITY

UNIVERSITY OF SOUTH DAKOTA

experience SIOUX FALLS south dakota

Sunday, April 30th

7:30am – 5:00pm	**Registration Desk**
7:30am – 8:30am	**Breakfast for AM workshop attendees and faculty**
8:00am – 11:00am	**Headshot Studio** We are offering professional headshots to our members this year! You will have the opportunity to schedule a slot during this time. Please stay tuned for more information
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 For all workshop attendees and faculty**
1:15pm – 4:45pm	**Afternoon Workshops**
2:30pm – 3:00pm	**Afternoon Workshop Break**
5:00pm - 6:00 pm	**Welcome Reception** Meet or reconnect with colleagues to kick-off the conference! Listen to music and enjoy delectable appetizers in the Hospitality Suite.
8:00pm – 11:00pm	**Hospitality Suite** The Hospitality Suite is open each night, offering a place to unwind and join colleagues.

Optional Workshops

AM Workshop: 8:30 AM – 12:00 PM

PM Workshop: 1:15 PM – 4:45 PM

All Workshops include lunch

Workshops

WS#	Time	Title
1	Morning	Introduction to Research Administration
2	Afternoon	Pre-Award Basics
3	Afternoon	Post-Award Basics
4	Full Day	Into and Pre-Award Basics (combination of 1 and 2)
5	Full Day	Intro and Post-Award Basics (combination of 1 and 3)
6	Morning	Closing Out Grants
7	Morning	The NIH Grant Cycle: An overview from RFA through Closeout
8	Afternoon	Effective Presentations – FREE for attendees!

Workshop Descriptions

Workshops 1-5: Introductions to Research Administration

Session Level: Basic

Learning Objectives:

Introduction to Research Administration

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

Pre-Award Basics

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

Post-Award Basics

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

Presenters:

Diane Hillebrand is the Assistant Director of Research & Sponsored Program Development at the University of North Dakota (UND) and a Certified Research Administrator. She started her research administration career in 1994 and has worked in several departments/colleges along with central grants all at UND. Diane currently provides pre-award review services and non-financial post-award modifications support for sponsored programs at UND. Diane is very active in NCURA and has served in various volunteer roles for NCURA Region IV and Nationally. She is currently National NCURA Departmental Research Administration Traveling Workshop Faculty and has served on the Board of Directors. She has also served NCURA Region IV in many ways including being the Chair in 2017. She can be reached at Diane.Hillebrand@UND.edu

Heather Offhaus is Director of the Grant Review & Analysis Office at the University of Michigan Medical School. She started her research administration career in 1994 in order to pay the rent and has grown the Medical School office from pre-award review services to include direct departmental pre/post award support, policy development, and comprehensive enterprise analytics through research metrics. Heather has served as Region Chair, Regional Treasurer, and National Treasurer. She is also on the Traveling Workshop Faculty and the national Nominating and Leadership Development Committee for NCURA. Heather is proud to be named an NCURA Distinguished Educator. She can be reached at hmills@umich.edu.

Shannon M. Sutton, MBA, CPA, is the Interim Vice President for Finance and Administration, Western Illinois University is a seasoned member of NCURA. She has served as Treasurer for both NCURA and Region IV and has been a member of the NCURA board. She is currently the chair of NCURA N&LDC, Traveling Workshop Faculty, and Peer Reviewer. Shannon's responsibilities include management of pre-award and post-award activities as well as human and animal subject regulations. She can be reached at sm-sutton@wiu.edu .

Roger Wareham, is the Director of the Office of Grants and Research at the University of Wisconsin-Green Bay. With 22 years in research administration, he holds an MFA in Arts Administration from Wayne State University and is a graduate of NCURA's Executive Leadership Program. Roger previously served a one-year Intergovernmental Personnel Act (IPA) assignment as a Grant Policy Specialist in the Policy Office at the National Science Foundation and is currently an NCURA Peer Reviewer and Region IV Treasurer. He can be reached at warehamr@uwgb.edu.

Workshop 6: Closing out Sponsored Projects - Practice to Learn Perspective and Best Practices

Session Level: Intermediate

Attendees will work through two closeout case studies: one federal and one non-federal mainly from a sponsored programs office perspective. Workshop facilitators will provide insight and tips to effectively close out awards quickly and smoothly.

Learning Objectives:

- Participants will identify roles and responsibilities related to award closeout.
- Discuss ways and share examples to identify action items before closeout process even starts.
- Use critical thinking skills during award management to avoid delays at closeout
- Apply common cost-accounting standards and cost principles to sponsored awards

Presenters:

Sandy Fowler is the Director of Business Services and Post-Award functions in the College of Agricultural and Life Sciences at the University of Wisconsin Madison. Sandy loves to tell grant management stories and strives to make learning policies, procedures, and regulations engaging. She believes there is a lesson learned in every complex grant management situation. Sandy is an NCURA Fundamentals Traveling Workshop faculty. She can be reached at sandy.fowler@wisc.edu.

Angie Johnson is the Interim Associate Director of Research and Financial Services and Managing Officer of the Non-Federal Post-Award Accountant Team in the Office of Research and Sponsored Programs at the University of Wisconsin Madison. Angie has nearly 15 years of post-award research administration experience and has been apart of several process improvement initiatives. She has a passion for teaching new research administrators and setting them up for success. She can be reached at angie.johnson@rsp.wisc.edu.

Diane Domanovics is the Assistant Vice President for Sponsored Projects in the Office of Research Administration at Case Western Reserve University. With more than 30 years of experience in research administration she has been involved in many aspects of the field. She currently oversees pre-award activities for all schools except the School of Medicine within the University, and all post-award activities for the entire University. This includes proposal preparation and submission, contract negotiation, award setup and management, effort reporting, cash management, financial compliance, policy creation and implementation, and training. Diane is a NCURA Peer Reviewer. She can be reached at diane.domanovics@case.edu.

Workshop 7: The NIH Grant Cycle: An overview from RFA through closeout

Session Level: Basic

On paper, the complete NIH Grant Cycle can appear to be quite daunting, however with a general understanding of the processes involved, submitting, and managing NIH Grants can be fairly straightforward. In this workshop, we will introduce the different parts of the NIH Grant Cycle. We will start with a review of RFAs, identify the different parts of the most common application types, and review the Just-in-Time and award requirements. Now that we have our award, we will review annual reporting and conclude with closeout. We will show our participants many resources available to them to make the NIH Grant Cycle a little bit easier to manage.

Learning Objectives:

- To develop a basic understanding of the different parts of the NIH Grant Cycle
- To have an opportunity to have questions answered about NIH Grants
- To learn tips and tricks when working with NIH staff through the Grant Cycle
- To identify the resources available to the research administrator for submitting and managing NIH Grants

Presenters:

Bill Courtney is a Research Administrator with the Office of Health Information and Data Science (OHIDS) at Washington University in St. Louis, Missouri. OHIDS houses the Institute for Informatics (I2), the Division of Biostatistics, and the Medical School Library. Bill and his team oversee sponsored project activities for these areas including pre-award assistance for all three areas and post-award activities for the Division of Biostatistics. A chemist by education, Bill spent 13 years at the bench before venturing into research administration. After several years as a pre-award specialist in Oncology, Bill moved to OHIDS to lead his own team. Bill also serves as a research administration instructor at Washington University, primarily focusing on teaching NIH pre-award skills to new research administrators. He can be reached at bill.courtney@wustl.edu.

Kimberly Smith is a Senior Grants Administrator within the School of Nursing at the University of Wisconsin, Milwaukee. She has extensive experience in proposal development, review, and submission as well as contract negotiation and award establishment. Kim is a Certified Research Administrator (CRA) and holds a Master's Degree in Research Administration from the University of Central Florida and a Master's Degree in Management. She is a current NCURA Region IV MOO Mentor and previously served as a mentor for Region III's mentoring program. She can be reached at smit3769@uwm.edu.

Workshop 8: Effective Presentations

Session Level: Basic

Calling all Research Administrators: Get ready for your next presentation whether at an NCURA event, the Symposium for Research Administrators, or your next staff meeting! Strong presentation skills are essential to your success as a research administrator. But do you have them? Whether you are presenting to 5 people or 500 people, building an effective presentation begins long before you take the stage. Assessment, preparation, and planning are essential if you want to design an engaging presentation. Join us for a hands-on, interactive session where you will obtain tools and learn strategies to increase the effectiveness of your next presentation. We will also explore communication and self-awareness practices to use when you are in front of an audience as well as technology-based tools to enhance both in-person and virtual presentations.

Learning Objectives:

- Explain the unique needs of adult learners.
- Follow popular instructional design methods.
- Write strong learning objectives for an effective presentation
- Apply simple techniques to create a participant-centered presentation.
- Identify their own strengths and areas for improvement as presenters.
- Incorporate different technology and tools to enhance in person and virtual presentations

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Presenters:

Sandy Fowler is the Director of Business Services and Post-Award functions in the College of Agricultural and Life Sciences at the University of Wisconsin Madison. Sandy loves to tell grant management stories and strives to make learning policies, procedures, and regulations engaging. She believes there is a lesson learned in every complex grant management situation. Sandy is an NCURA Fundamentals Traveling Workshop faculty. She can be reached at sandy.fowler@wisc.edu .

Melanie Hebl, APTD is the Training and Organizational, Development Manager in the Office of Research and Sponsored Programs at the University of Wisconsin-Madison. Melanie is passionate about training, customer service, and workplace wellness in research administration. She recently served as Chair of the NCURA Professional Development Committee (PDC). She can be reached at melanie.hebl@wisc.edu.

Monday, May 1st

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

7:30am – 8:45am Breakfast & Round Table Discussions

Grants and Banner: It Can Be Done!

Erica Kennedy, Director of Sponsored Programs, John Carroll University

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Pre-Award Basics

Gretchen Carnoske, Grant Specialist II, Washington University in St. Louis

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PUI Networking

Charlotte Whited, Associate Director and Compliance Officer, Carleton College

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Work/Life Balance - When Your Priorities Aren't Everyone Else's

Nancy Reidelberger, Director of Research/Business Administration, Washington University in St. Louis

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8:45am – 9:00am Opening Remarks

9:00am – 10:15am Keynote Speaker – Stephanie Arne

Stephanie is an accomplished wildlife conservationist and the former host of Mutual of Omaha's Wild Kingdom. She has worked with – and learned from – biologists, conservation leaders, CEOs, farmers, and fishermen in over 20 countries. Her insight has earned her a seat on the International Union of Conservation Nature's (IUCN), Education and Communication Commission, and as an Ambassador for Scubapro and CuriosityStream. Stephanie has also appeared on The Weather Channel, Animal Planet, and The Harry Connick Jr. Show. Steph and her husband, wildlife artist, Tim Davison lived in a 180 sq.ft. tiny house for 5 years which was featured on Tiny House, Big Living on HGTV. Currently, Stephanie is the Director of Conservation in her home state of South Dakota at the Great Plains Zoo.

10:15am – 10:45am Monday Break 1

10:45am – 12:00pm Concurrent Sessions and Discussion Groups

Cost Share – It isn't play money; it is real.

Session Level: Basic

Post-Award/Financial
Discussion Group

Using play money, attendees will manage and track cost share to visualize how cost share is a real cost to institutions.

- Recognize how costly cost share can be to an institution
- Distinguish the differences between mandatory and voluntary cost share
- Determine other ways to offer support for research without offering cost share

Sandy Fowler, Director, College of Agricultural and Life Sciences, University of Wisconsin Madison

Katie Schortgen, Grants and Contracts Management Senior Analyst, Grants Management Office, College of Medicine, The Ohio State University

NSF Proposal Modernization Update: Research.gov

Session Level: Basic

Federal
Concurrent Session

Goodbye FastLane proposal preparation, hello Research.gov proposal preparation! NSF has transitioned all proposal preparation and submission from FastLane to Research.gov when the Proposal & Award Policies & Procedures Guide (PAPPG) (NSF 23-1) went into effect in January 2023. Join a representative from NSF's Division of Information Systems for an overview of the Research.gov Proposal Submission System, recent enhancements, and available training resources including an extensive proposal preparation demo site to help the research community make the transition. During the session, the presenter will show how to quickly and easily create a Research.gov proposal, supplements, upload proposal documents, manage senior personnel, and much more using NSF's user-friendly and intuitive Research.gov proposal preparation system. Learn about recent updates in Research.gov and FastLane decommissioning efforts

- Learn about the proposal preparation demo site and other available training resources to support the transition.
- Step into the shoes of a Principal Investigator (PI) and prepare a Research.gov proposal.

Stephanie Yee, IT Specialist, National Science Foundation

Research Compliance at a Liberal Arts University

Compliance/Industry

Session Level: Intermediate

Concurrent Session

Research dollars come with strings attached. The Institution and the researcher are obliged to follow a wide variety of rules as well as academic consensus standards. Researchers may not be fully aware of all the commitments made on their behalf. These include such diverse matters as humane treatment of animals, specific guidelines for ethical treatment of human subjects, addressing actual or perceived conflicts of interest, managing chemical, biological and radiological safety, and perhaps controlling access to certain technology. In addition, each institution must have a mechanism to provide instruction on Responsible Conduct of Research, and a means of addressing allegations of research misconduct. The University of South Dakota has brought all of these compliance programs into a single office, and Mr. O'Kelley will describe and share their methods to manage these various issues.

- Self-audits
- Tools
- Inspections
- Resources
- Committees
- Non-compliance

Kevin O'Kelley, Assistant Vice-President for Research Compliance, Office of Research & Sponsored Programs, University of South Dakota

Leading Without a Title: The Untapped Potential of Graduate Student Leadership in Research Administration.

Leadership

Session Level: Basic

Concurrent Session

Graduate students are an often-untapped resource for the success and growth of an organization, while also holding positions of critical importance. This presentation is a first-hand account of how a successful program that relies upon and effectively utilizes graduate student experience can not only be effective but can be a model and a leader for others. Graduate students are future leaders in their fields; if we can tap into that expertise early and cultivate their learning, the mutual growth that can take place is immeasurable and vital in our ever- changing world.

- Participants will learn first-hand from graduate students how leading without a title is a necessary and needed skill in the field and one that can be cultivated through proper organizational structure and scaffolding.
- Participants will engage in discussion on how to meaningfully utilize graduate students' strengths and experiences to meet their community needs.
- Participants will apply the presented material to their own circumstances to create a more robust means to utilize graduate students as leaders in their organization.

Daniel Foster, Graduate Research Assistant, The Impact Accelerator, College of Education, Criminal Justice, and Human Services, University of Cincinnati

Krysta Knox, Graduate Research Assistant, The Impact Accelerator, College of Education, Criminal Justice, and Human Services, University of Cincinnati

Clay Driscoll, Graduate Research Assistant, The Impact Accelerator, College of Education, Criminal Justice, and Human Services, University of Cincinnati

Master’s Degree vs. Certifications: Choose Your Own Adventure

Professional/Personal Development

Session Level: Basic

Concurrent Session

Have you thought about getting your Master’s Degree or Certification in Research Administration? This is the session for you. We will take participants on a deep dive from people who have lived and breathed both directions of this topic. It will covered different Master’s options that are common among research administrators as well as the struggle of studying for the CRA, CPRA, and CFRA. We compare costs, time commitments, and so much more on this topic. If you have thought about advancing your career, this is the session you won’t want to miss.

- Gather information about the programs available to Research administrators.
- Be able to make an informed decision regarding Certifications and Master’s degrees.
- Identify and overcome obstacles for not getting advanced training.

Kimberly J Smith, **MRA, CRA**, Grants Administrator, Shared Office for Administration of Research (SOAR), University of Wisconsin-Milwaukee

Georgetta Dennis, MRA, CRA, CPRA, CFRA, Senior Associate, Attain Partners

Supporting PIs: Is Yes Always the Right Answer....?

Departmental

Session Level: Basic

Concurrent Session

As research administrators, we are customer service oriented and encouraged early in our careers to find creative solutions to help faculty get where (or what) they need. Is Yes always the best answer, though? Whether dealing with F&A rates, wanting to submit a proposal (too close to the deadline), or purchasing a piece of equipment in the last 3 days of a project, you know you have the mad skills to get to Yes. However, when you wear your institutional hat, it isn’t always in the best interest of the wider community. Come discuss case studies, learn about factors to weigh before getting to Yes, and how to have those tough conversations when Yes is not the right answer.

- Consider the balance between customer service and institutional obligations.
- Identify investigator and institutional priorities that may not align.
- Explore how to have discussions with faculty related to delivering hard to hear news.

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

Beth Woods,Associate Director, Center for Biomolecular Studies, University of Illinois Chicago

DEI in Action: How Research Administrators Can Enact Change, Every Day

Professional/Personal Development

Session Level: Overview

Concurrent Session

You've attended DEI trainings, you understand the basic definitions--but what can YOU do to enact change in your role as a research administrator? This session will focus on definitions and concepts of JDEIA (Justice, Diversity, Equity, Inclusion, Accessibility), current best practices, and actual actions and tips that research administrators, specifically, can take in common situations we encounter to be catalysts for change in our industry and in the world.

- To understand core concepts of JDEIA practices (overview)
- Develop a toolkit of responses and best practices for potential situations for allyship.
- Increase understanding of the role JDEIA plays in NCURA and in the profession of research administration

Lauren Gee, Pre-Award Manager, University of Wisconsin Madison

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

1:00pm - 2:00pm Concepts Expo Poster Session

The 5 C's: Building stronger teams to deliver top-notch research administration

Beth Woods, Associate Director, University of Illinois Chicago

Research Development at Predominantly Undergraduate Institutions: Best Practices, Current Gaps, and Faculty Perspectives

Erica Kennedy, Director of Sponsored Programs, John Carroll University

Mentoring Our Own Program (MOO)

Crystal James, Business Operations Coordinator Sr., Medical College of Wisconsin

Region IV Awards Committee

Bill Courtney, Research Administrator, Washington University in St. Louis

Region IV Communications Committee

Barb Bittner, Sponsored Programs Administrator, Creighton University

Region IV Membership Committee

Keith Kutz, Senior Awards Administrator, Iowa State University

Region IV Professional Development Committee (PDC)

Crystal James, Business Operations Coordinator Sr., Medical College of Wisconsin

Region IV Site Selection Committee

Members of the Region IV Site Selection Committee

2:00pm – 2:15pm **Monday Break 2**

2:15pm – 3:45pm **Concurrent Sessions and Discussion Groups**

NIH, DoD, NSF and DOE Alphabet Soup: What are the different ingredients?

Federal

Session Level: Basic

Concurrent Session

The major federal research players all have their own ingredients to make a spectacular soup. This session will provide the focus of each player and highlight some differences to know when proposing your recipe. The recipe product is important; however, the ingredients make or break the soup.

- Participants will learn and identify each agency's focus, different requirements for Biosketches and Other Support, specific NIH nuances, and various prior approval requirements.

Brenda Egan, Manager, Proposals, Research and Sponsored Programs, University of Wisconsin - Madison

Diane Hillebrand, Assistant Director, Research and Sponsored Program Development, University of North Dakota

Negotiating IP and Publication Language in Sponsored Research Agreements

Compliance/Industry

Session Level: Basic

Concurrent Session

This session will explore the basics of publication and intellectual property language you will often see in sponsored research agreements. We will also discuss language preferences and the policies at our institution, including our waiver processes.

- Be able to issue spot troublesome publication language and negotiate alternate clauses.
- Be able to issue spot troublesome intellectual property language and negotiate alternate clauses.
- Understand the impact of waiving intellectual property and publication rights in an educational setting.

Chase Bunger, Research Contracts Manager, University of Missouri

Follow-up Discussion to Leading Without a Title: The Untapped Potential of Graduate Student Leadership in Research Administration.

Leadership

Session Level: Basic | Discussion Group

This session will be a discussion group of the concurrent session, *Leading Without a Title: The Untapped Potential of Graduate Student Leadership in Research Administration*. After a brief overview of the previous session, the group will discuss strategies, barriers, and solutions for systematically incorporating graduate students into research administration departments. This discussion session will be an extension of the ideas and strategies raised in the concurrent session as well as an opportunity to introduce new ideas raised by attendees who only join for the discussion session.

- Participants will learn first-hand from graduate students how leading without a title is a necessary and needed skill in the field and one that can be cultivated through proper organizational structure and scaffolding.
- Participants will engage in discussion on how to meaningfully utilize graduate students' strengths and experiences to meet their community needs.
- Participants will apply the presented material to their own circumstances to create a more robust means to utilize graduate students as leaders in their organization.

Clair Green-Schwartz, Research Manager, University of Cincinnati

John Schwartz, Sr. Business Officer, College of Education, Criminal Justice, Human Services and Information Technology (CECH), University of Cincinnati

Who Moved My Water Cooler? Networking for Research Administrators in a Remote/Hybrid Environment

Professional/Personal Development

Session Level: Basic | Concurrent Session

Covid-19 has upended the idea of networking for research administrators. Gone are the days of in-person meetings, water cooler chats and lunches with your RA colleagues as remote/hybrid workforces have become the norm across our entire community. How do you "network" both at your institution and beyond in this new reality? Two senior RA's will guide you through a host of formal, informal, and homegrown networking opportunities they have been involved in at their institution. NCURA & SRAI specific opportunities, local level ideas for low/no budget environments, plus pitfalls and obstacles (along with mitigation suggestions) will be discussed to give attendees a framework for how to integrate "new normal" networking at all levels of research administration.

- Provide ideas for formal network opportunities at the local & national level.
- Provide ideas for information & homegrown network opportunities at the local & national level

Nicholas Prieur, Research Administration Senior Manager, University of Michigan
Catherine Liebowitz, Research Administration Senior Manager, University of Michigan

A PI is leaving? Oh no! What happens to their pending and active awards??

Departmental

Session Level: Basic/Intermediate

Concurrent Session

Have you recently received word that one of your PIs will be leaving your institution? And are you concerned about what will happen to their pending and active sponsored projects? This is not a new situation, but it could be a new experience for you as a research administrator. Every case is not the same, especially in how awards are handled. Plan to attend this session where you will learn tips and tricks to make this process easier (we hope!) and less stressful for everyone, especially you, the Research Administrator assisting the PI, Department/Unit, and the institution!

- Discover the importance of being "in the know" as soon as possible if you have a PI leaving your institution.
- Build a toolbox of helpful tips and tricks for handling the transfer or termination of the PI's active awards.
- Analyze and discuss specific cases presented.
- Understand that there are differences in dealing with federal vs. non-federal awards in these situations.

Lynn Bagley, CRA, Research Administrator/VRAC Administration Manager, College of Engineering, Iowa State University

Keith Kutz, MS, CRA, Senior Award Administrator, Office of Sponsored Programs Administration, Iowa State University

Are you a PUI? The answer might surprise you!

PUI

Session Level: Basic

Concurrent Discussion

This session will examine different definitions of a PUI (predominantly undergraduate institution) and show just how broad a category it truly is. We will use criteria from federal sponsors and the Carnegie Classifications to illuminate the broad range of institutions classified as PUIs. Are ERIs (emerging research institutions) the same? We'll find out. Topics such as culture and research, differences from R1s, and ways RA flourishes at small schools--despite minimal resources--will be presented.

- Understand how institutions are classified across awarding agencies and other organizations (Carnegie and American Council on Education).
- Identify characteristics of PUIs and ERIs.
- Gain knowledge on culture, research administration, and funding trends specific to PUIs and ERIs.

Erica Kennedy, Director, Office of Sponsored Programs, John Carroll University

3:45pm – 4:00pm **Monday Break 3**

4:00pm – 5:00pm **Concurrent Sessions and Discussion Groups**

The Role of Universities in Advancing Economic and Workforce Development

Pre-Award

Session Level: Intermediate

Discussion Group

Through a guided discussion, participants will share the best practices of universities in terms of addressing economic and workforce development; define an organizational structure that has been shown to be effective; and describe characteristics of successful community partnerships.

- Identify best practices related to the role of universities in economic and workforce development.
- Define the optimal university organizational structure.
- Describe characteristics of successful community-based partnerships.

Carl A. Fox, Ph.D., Chief Research Administration Officer, University of Wisconsin--Whitewater

Elizabeth Thelen, M.S., Executive Director, Whitewater University Innovation Center

Federal vs Non-Federal Award Management

Post-Award/Financial

Session Level: Intermediate

Concurrent Session

Describe responsibilities during the post award phase.

- Review key elements in an award document
- Uniform Guidance applicability
- How to prevent delays in the award reconciliation and set-up stage
- Explain administrative requirements for each and everything in-between
- Financial and sub-contracting considerations between award types
- Reporting requirement differences
- Close-out and awarding differences

Angie Johnson, Interim Associate Director, Managing Officer, Research and Sponsored Programs, University of Wisconsin-Madison

Jennifer Foley, Administrator, Medical College of Wisconsin

Update from USDA-NIFA Office of Grants and Financial Management

Session Level: Basic

Federal
Concurrent Session

Presentation will include information on organization, award/financial/policy updates, agency initiatives, and more!

- Understanding the USDA-NIFA Organization;
- Successful Grant Management;
- Policy and Guidance Update

Kimberly Whittet, Senior Policy Advisor, National Institute of Food and Agriculture

Overview of the Visa Process

Session Level: Basic

Compliance/Industry
Concurrent Session

An overview of the different types of Visas, requirements for each, and the process followed at Washington University in St. Louis.

- Learn the different types of Visa's available
- Eligibility & requirements for each type of Visa
- Fees and processing timelines

Helen Black, Visa Specialist, Division of Oncology, Washington University in St. Louis

Michelle Kennett, Associate Vice Chancellor for Research, University of Missouri-Columbia

Dashboards in Google Sheets: What, Why, and a Little How

Session Level: Overview

Data/Metrics/eRA
Concurrent Session

This session will give you an overview of Google Sheets Dashboards. Dashboards are a way to present complex or lengthy data in a way that is easy to access and update. Sharing data in our increasingly remote world calls for tools that disseminate information quickly, accurately, and easily in a cost conscious manner.

- Understand the concept of a dashboard (What)
- Identify the benefits for the research administration community and their customers (Why)
- Understand the steps in making/updating a dashboard (How)

Linda Solarek, CYGNSS Program Manager, University of Michigan

Supervision For the First-Time Supervisor

Leadership

Session Level: Basic

Concurrent Session

Career advancement often involves added responsibility to directly supervise and evaluate other professionals. However, many entry-level roles do not offer the opportunity to practice supervision. This can lead to a "learn as you go" experience for many first-time supervisors. In an increasingly competitive job market and with the proliferation of telework opportunities since the pandemic, effective supervision and mentoring of employees can often be the difference between retention or turnover. This session will examine the development of an individual's supervisory philosophy through different lenses and provide an opportunity for attendees to reflect on their own philosophy of supervision. There will also be an opportunity for discussion of best practices and effective mentorship.

- Participants will be able to name at least three different philosophies of supervision based on current literature.
- Participants will understand the impact effective supervision has on the retention of employees.
- Participants will reflect on their own style of supervision.
- Participants will be able identify additional opportunities for personal growth and development around their own style of supervision and mentors.

Nathan Winters, Post Award Lead, University of Missouri

Becky Black, Post Award Lead, University of Missouri

Stop - Collaborate and Listen: A collaborative team model for research administration

Departmental

Session Level: Basic

Concurrent Session

In the fast-paced, dynamic environment of research administration, collaborative teams are essential for success. We share our collaborative model and present the experience of establishing our model from three perspectives. We will discuss the definition of a collaborative team, its benefits and challenges, and provide tips/tricks for establishing your own collaborative team.

- Differentiate between collaborative teams and other types of teams.
- Describe the benefits and challenges of collaborative teams.
- Use the lessons learned and tips/tricks to identify potential pitfalls for establishing your own collaborative team and how to overcome them

Hang McLaughlin, Surgery Grants & Contracts Manager, University of Minnesota

Mellani Lubuag, Grants & Contracts Prof 4, Surgery, University of Minnesota

Jillian Rung, Grants & Contracts Prof 4, Surgery, University of Minnesota

5:15pm – 6:15pm **Newcomers Reception**

Everyone new to NCURA, or new to the Regional Meeting, is invited to join Region IV leadership for refreshments and to learn more about the organization.

6:15pm – 9:00pm **Monday Night Dinner Groups**

Sign up to join other NCURA attendees and experience the local fare Sioux Falls has to offer. Dinner Groups will meet in the lobby at 6:00 pm for reservations at nearby restaurants.

8:30pm – 11:30pm **Hospitality Suite**

The Hospitality Suite is open each night, offering a place to unwind and chat with colleagues.

Tuesday, May 2nd

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

7:30am – 9:00am **Breakfast & Breakfast Roundtable Discussions**

An Introduction to Subawards for New Administrators

Bryan Bartee, Grants & Contracts Administrator, University of Chicago

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PUI Networking

Erica Kennedy, Director of Sponsored Programs, John Carroll University

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Understanding the Visa Process

Helen Black, Visa Specialist, Division of Oncology, Washington University in St. Louis

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PDC – Career Path Pilot Program

Dorothy Johnson, Interim Associate Director, Research Financial Services; Managing Officer, Research and Sponsored Program, University of Wisconsin-Madison

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8:00am – 12:00pm **Headshot Studio**

We are offering professional headshots to our members this year! You will have the opportunity to schedule a slot during this time. Please stay tuned for more information.

9:00am – 10:30am **Concurrent Sessions and Discussion Groups**

Preparing for and Surviving an Audit

Post-Award/Financial

Session Level: Intermediate

Concurrent Session

A former auditor now research administrator will share insights learned from and strategies to survive an audit.

- Understand the OMB Compliance Supplement and how it impacts auditors who are engaged on a Single Audit.
- Explore strategies for dealing with potential auditor testing and questions.
- Review real audits and learn about potential audit findings and how to counteract with proper guidance to your colleagues ahead of time

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Kyle Everard, Audit Coordinator and Managing Officer of NSF-DOE Team, Research and Sponsored Programs, University of Wisconsin-Madison

Case Studies of the Non-Compliance Kind

Compliance/Industry

Session Level: Industry Concurrent Session

Attendees will review and discuss in groups five case studies in which non-compliance with sponsor terms and conditions occurred, the results of those findings, and how to prevent such occurrences in the future

- Draft three policies and procedures to proactively prevent non-compliance;
- Implement best practices at attendee institution;
- Create list of signs that non-compliance is occurring.

Meaghan Ventura, Senior Sponsored Projects Officer, Research Institute at Nationwide Children's Hospital

Storytelling with Numbers: Using Data and Metrics to Achieve Individual and Team Goals

Data/Metrics/eRA

Session Level: Intermediate Concurrent Session

Research administration is full of data and numbers but which ones help you tell the story of your department or unit? Which numbers can you use as evidence for hiring additional staff? Which ones can be useful for getting a promotion? How do you know if your research and innovation is headed in the right direction?

- Learn which data and metrics to use to tell the story of your department.
- Include examples of metrics to use in your strategic planning process.
- Discuss data can you track beyond your standard grants management system.

Clair Green-Schwartz, Research Manager, University of Cincinnati

Clay Driscoll, Research Manager, University of Cincinnati Lead, University of Michigan

Victorious Victors - The inception and structure of the CRA program at the University of Michigan

Professional/Personal Development

Session Level: Basic

Concurrent Session

The University of Michigan launched its own CRA exam preparation program, aiM Higher, in spring 2016. aiM Higher has since helped CRAs from the University of Michigan as well as participants from outside organizations. After several successful years, the CRA Victors group was created in the summer of 2021 to support CRAs in the post-exam phase for recertification support and to offer connection opportunities. To date, the University of Michigan has approximately 80 CRAs. Join us to learn more about an in-depth recertification process guide and how the intertwined aiM Higher and CRA Victors programs at the University of Michigan were created as a CRA support structure.

- How to study and prepare for the CRA exam
- How to recertify for the CRA.

Corinna Burghardt, Research Administrator Senior, University of Michigan

Stephanie Blackmore, Research Administrator Lead, University of Michigan

My proposal will be funded – why can't I start spending? (AKA, Why is it taking so long to get an account number?)

Departmental

Session Level: Basic/Intermediate

Concurrent Session

We love to see the happiness on a researcher's face when they find out their proposal is being funded. We hate to see the disappointment when they are told it will be a while before they can start spending. Presented from the perspectives of the department and central office, this session will touch on the general steps involved in setting up an award, from the letter of intent through execution and post-execution processing. We will identify some of the points at which the award process can slow down and discuss steps to prevent the process from stalling out.

- Gain a better understanding of the general award process for both federal and non- federal sponsors.
- Learn how to develop a road map with points of delay, traffic stops, and possible detours.
- Discuss communication topics that can help avoid or a least minimize delays and frustration.

Keith Kutz, MS, CRA, Senior Award Administrator, Office of Sponsored Programs Administration, Iowa State University

Lynn Bagley, CRA, Research Administrator/VRAC Administration Manager, College of Engineering, Iowa State University

Overcoming Rejection: Proposal Resubmission Through a PUI Lens

PUI

Session Level: Intermediate — Concurrent Session

Proposal writing is hard work. Moving past rejection, resubmitting proposals and writing with the reviewer in remind are the necessary steps to build toward funding success. This session will discuss the proposal review process, interpreting and responding to reviewer feedback, and strategies for building successful resubmissions through the lens of a Predominantly Undergraduate Institution (PUI) faculty member.

- Participants will be able to identify strategies for helping PIs overcome proposal rejection.
- Participants will be able to identify steps for determining when/if resubmission should occur.
- Participants will learn strategies to help PIs strengthen proposals by writing for the reviewer and deciphering reviewers comments.

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

Dr. Anne Hoeltke, Director, Office of Research and Sponsored Programs, University of Wisconsin-Stout

10:30am – 11:00am Tuesday Break 1

11:00am – 12:00pm Concurrent Sessions and Discussion Groups

Research Development: Exploring its use in Research Administration

Pre-Award

Session Level: Basic — Concurrent Session

What's the difference between Research Development and Research Administration? You would be surprised how similar, yet vastly different, they can be. While both fields are largely project management based, the work done in research development can catapult a proposal from the normal, to out of this world. Join two research development professionals with strong research administration backgrounds as we discuss the basics and how to incorporate methods that will bring strength to a research proposal team.

- What is research development?
- How can an RA do research development? What might they already do?
- What might a faculty need regarding research development?
- What are some stumbling blocks an RA might encounter?
- How can I convince my leadership to buy into learning more?

Beth Jakubowski, Research Proposal Manager, Research Development, College of Engineering, University of Michigan

Elaine Meinzer Assistant Director of Research Development, College of Engineering, University of Michigan

A little bit Country and a whole lot of Rock 'n' Roll

Post-Award/Financial

Session Level: Intermediate

Concurrent Session

In this session, you will learn about how an experienced Post-Award Administrator needs to have a little bit of pre-award knowledge in order to successfully manage all the post-award activities required.

- Key points to look for in a contract (Fringe Benefit rates, IDC rate calculations, Report due date(s), Various type of reports, Invoicing /Payment, etc.)
- Understanding Budgets and the intention behind what is proposed and how that relates to post-award administration & when to question it

Katie Schortgen, Grants and Contracts Management Senior Analyst, Grants Management Office, College of Medicine, The Ohio State University

Anne Fo, Senior Accountant/Analyst, Grant Accounting, Eastern Michigan University

NSF Proposal and Award Policy Update

Federal

Session Level: Basic

Concurrent Session

This session will cover new and upcoming developments related to proposal and award policy at the National Science Foundation.

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

Jeremy Leffler, Outreach Specialist, Policy Office, National Science Foundation (NSF)

So FAR So Good: Negotiating FAR Clauses from a Public University Perspective

Compliance/Industry

Session Level: Intermediate

Concurrent Session

This presentation will provide an overview of common FAR clauses negotiated by public Universities, including justifications for requested changes and strategies for negotiation.

- Be able to recognize common FAR clauses.
- Be able to understand the purpose of requesting specific changes.
- Understand how to approach specific FAR negotiations with prime sponsors or pass through entities.

Jeremiah Lotven, Pre-Award Manager, Sponsored Programs Administration, University of Missouri

Career Progression Plan Model

Leadership

Session Level: Overview — Concurrent Session

The University of Missouri Sponsored Programs Administration (SPA) office was facing many challenges to recruiting and retaining employees. After much discussion internally and with leadership, a Career Progression Plan was implemented to stabilize the workforce within SPA. This Career Path, Line of Progression plan provides staff and managers a vital roadmap for recruiting, retaining and developing staff. This session will go over the purpose, scope, process and implementation of the plan that has transformed the environment within SPA.

- Discuss Challenges facing the current workforce environment.
- Detail the actions taken to implement the Progression Plan.
- Define the progression plan and explain how it works.

Craig David, Director, Sponsored Programs Administration, University of Missouri

PI speak, breaking down the finances for everyone.

Departmental; Post-Award/Financial

Session Level: Basic — Discussion Group

PI's speak research, admins speak finances and compliance. How can we easily cross that barrier to get everyone on the same page. Join us for a discussion of some of our best practices and procedures and how you can get the faculty on board to help you help them with finances.

- General overview of financial conversations
- How to speak PI, best practices.
- Conversation tips to talking with faculty about their grant finances

Kelly Andringa, PhD, MBA, Research Manager, Department of Orthopedics and Rehabilitation, University of Iowa

Sarah Hansen, Business Officer, University of Nebraska -Lincoln

Internal Funding Programs at PUIs

PUI

Session Level: Overview — Concurrent Session

Come hear about the internal funding opportunities that Minnesota State Mankato offers to support and increase the University's grant activity. The Faculty Research Grants, Faculty Scholarship Grants, and Grant Writing Incentives provide seed funding for research/creative projects and promote grant submissions. Listen to how Minnesota State University, Mankato has provided resources and support for faculty & staff, with the goal of encouraging our PIs to apply for external funding!

- Participants will review grant guidelines/rubric to see what has been successful for the application process.
- Participants will hear ideas on workshops and one-on-one sessions to help PIs develop their proposal.
- Participants will hear how to engage PIs once they have secured an internal grant

Kristel Seth, Director, Minnesota State University-Mankato

Jeane McGraw, Grants Coordinator, Minnesota State University- Mankato

12:00pm – 1:00pm Lunch

1:00pm – 2:00pm Concurrent Sessions and Discussion Groups

A Central Research Administrator's Guide to IUCRCs

Pre-Award

Session Level: Intermediate — Concurrent Session

Delve into the world of Industry-University Cooperative Research Centers (IUCRC). Learn the various components of a center as well as how the central research administrator can play a crucial role during the initial set up process.

- Basic overview of an IUCRC and why it is beneficial
- Various elements required for setting up an IUCRC
- How the Central Research Administrator can be an asset
- Recommendations for setting up a successful IUCRC

Meghan Calandro-Howell, Senior Award Negotiator, Sponsored Programs Administration, University of Illinois Urbana-Champaign

NIH Update

Session Level: Overview

Federal
Concurrent Session

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

Upon completion of this session, participants will be able to:

- demonstrate an understanding of the NIH grants policy requirements;
- identify the source of policy requirements; and
- provide examples of current issues at NIH.

Carrie Mitchell, Assistant Grants Policy Officer, National Institutes of Health (NIH)

Methods for decreasing contract negotiation time with industry partners

Session Level: Basic

Compliance/Industry
Discussion Group

A discussion of ways to reduce the time to negotiate research agreements with industry sponsors.

- Understand the process of negotiating with industry partners; Identify specific tools to reduce negotiation times; Identify existing problems that lengthen negotiation times.
- Identifying grant/award challenges for community based organizations with limited involvement in federal / research funding
- Provide pre-award /post-award strategies for successfully engaging these organizations in your grant submissions and awards

Raymond Cluckey, JD, Project Representative, Office of Research and Sponsored Projects, University of Michigan

Joseph Johnson, JD, Project Representative, Office of Research and Sponsored Projects, University of Michigan

Hammer and Nails: How to Build the Best Tools for Your Pre-Award Grants Management Team

Session Level: Basic

Data/Metrics/eRA

Concurrent Session

In this session, Beth and Kim will share tools built internally at both of their institutions to streamline development of proposals and budgets and plan for successful submission.

- Discuss Intake Process (Redcap Database)
- Learn the benefits of checklists and setting deadlines with PIs
- Budget development excel templates and strategies
- Templates and SOPs for commonly utilized documents
- Brief overview of Proposal Submission Portal (Cayuse for OSU)

Beth Vickio, Grants and Contracts Specialist, College of Medicine, The Ohio State University

Kimberly Smith, Senior Grants Administrator, University of Wisconsin - Milwaukee

Exploring satisfaction among research administrators at their current place of employment

Leadership

Session Level: Basic

Concurrent Session

This research aims to explore satisfaction among research administrators at their current employment. This study will examine the relationships among research administrators' overall perceptions of employee satisfaction and skills training and leadership development opportunities available through their place of employment. Are research administrators satisfied with the types of professional development available at their employment? Does satisfaction regarding professional development opportunities impact overall satisfaction with their current place of employment? The Research Administrator Employment Satisfaction Survey was created to collect participant data related to their place of employment, duration at employment, and satisfaction related to skills training, leadership development, and overall satisfaction. Research administrators elected to participate via email invitation through professional listservs to which they subscribe. Surveys were collected and analyzed via quantitative methods.

- Participants will able to compare employee satisfaction data about research administrators to prior literature related to general and higher-education employee satisfaction.
- Participants will be able to summarize the relationships among research administrators' overall perceptions of employee satisfaction and skills training and leadership development available through their place of employment.
- Participants will be able to relate the data presented to their satisfaction experiences within research administration.

Heather Lowmiller, Director of Grants and Sponsored Programs, Indiana Wesleyan University

Thriving in a virtual research administration workplace: Creating a workspace to enhance personal wellbeing and productivity

Professional/Personal Development

Session Level: Basic — Concurrent Session

The pandemic has shifted how we work and interact across our organizations. Many traditional in-person research administration roles have moved to hybrid or fully remote positions and are continued to only grow in the coming years. While remote work offers many benefits for employees it also has the potential to contribute to increased stress and potential burnout for individuals. Personal well-being is crucial for remote workers and can help contribute to a healthier work-life balance, increased productivity and overall job satisfaction. In this session we will discuss the importance of prioritizing your personal wellness and identify opportunities that you can utilize in your workday to create a more productive workspace to avoid burnout and allow you to thrive in your work.

- Understand how personal wellness can positively impact job satisfaction and productivity in a virtual workspace.
- Recognize best practices for creating a healthy remote workspace to be most efficient and productive
- Learn how to utilize mindfulness to create a healthier work-life balance and reduce stress.
- Discover initiatives and resources you can utilize to improve your personal wellbeing in your workday.

Crystal James, Business Operations Coordinator Senior, Department of Microbiology and Immunology, Medical College of Wisconsin

A “go-to” guide for managing sub-award relationships with community-based organizations

Departmental

Session Level: Intermediate — Concurrent Session

Competitive and impactful federal grant submissions need to include collaborations with community-based organizations—but many of these organizations have limited experience managing federal funding and navigating the complexities of working with research universities. This presentation will share overall approaches, successes, and challenges of the presenter's collaborations with community-based organizations through the pre- and post-award life cycle of external grant funding. Participants will learn strategies, best practices, and tips for successfully working with community organizations—from engaging them in the grant submission to managing them in federal awards. Participants will leave with a framework for ensuring successful inclusion of community partner organizations in their own grant portfolios.

- Identifying grant/award challenges for community based organizations with limited involvement in federal / research funding
- Provide pre-award /post-award strategies for successfully engaging these organizations in your grant submissions and awards

Nicholas Prieur, Research Administration Senior Manager, Institute for Social Research, University of Michigan

2:00pm – 2:15pm **Tuesday Break 2**

2:15pm - 3:15pm **Region IV Business Meeting**

The Regional Business Meeting will introduce current and incoming officers, describe ongoing initiatives and provide information on the regional activities. Come get involved in Region IV!

3:15pm – 3:450pm **Tuesday Break 3**

3:45pm – 5:00pm **Concurrent Sessions and Discussion Groups**

NIH Escape Room: Submission Day in the Life of a Research Administrator

Pre-Award

Session Level: Advanced

Concurrent Session

When asked what a typical submission day is like in the life of a research administrator, the standard response is "it depends". This interactive session combines commonly encountered situations into a complex adventure in which teams must test their skills and knowledge in order to solve the puzzles and submit a National Institutes of Health R01 proposal before the deadline. Participants will leave this session with a list of best practices for prioritizing and organizing tasks and duties, as well as ideas for solving common research administration scenarios.

This is an interactive session in which participants will be broken into groups of 4-5 and asked to solve puzzles and perform tasks in order to "escape" the day.

- List three key strategies for prioritizing and organizing tasks and duties
- Identify 5 best practices for ensuring compliance with NIH submission guidelines
- Balance multiple tasks and collaborate with team members

Prerequisite: Attendees must have experience with NIH SF424 and FORMS-H applications.

Meaghan Ventura, Senior Sponsored Projects Officer, Research Institute at Nationwide Children's Hospital

Catherine Warshaw-Garguilo, Research Institute at Nationwide Children's Hospital

Closeouts

Post-Award/Financial

Session Level: Intermediate — Concurrent Session

You started your close out process on the first day the award started – what could possibly go amiss at the end of project? Anything! The impact of sponsor regulations, investigator needs, institutional expectations, and the department research administrator's previous experience all feed into a successful close out. In many closeouts, though, there seem to be exceptional circumstances, from financial to data management issues, that need to be addressed by the DRA. This session will start with an overview of typical close out activities and best practices in the department; then stray into (un)common close out scenarios and complex issues that may be referred to as "hypothetical."

- Participants will be able to identify common practices and requirements in the closeout process.
- Participants will recognize complex closeout issues and appropriate handling

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

Samantha Westcott, Research Administrator, University of Wisconsin - Milwaukee

DOE Update: IP in a Hypercompetitive World

Federal

Session Level: Intermediate — Concurrent Session

Discussion on various U.S. Manufacturing and research security requirement for DOE awards.

- Learn about DOE's U.S. Manufacturing, research security and conflict of interest policies.

Brian Lally, Assistant General Counsel, U.S. Department of Energy

Don't Fear the "Ping": Managing Email Overload

Data/Metrics/eRA

Session Level: Basic — Concurrent Session

Do you feel constantly overwhelmed by your inbox? Do you dread yet another email? This session will review the journey of work related email from helpful to horrible and review tools to manage your inbox and take back your work time.

- Describe the problems email poses to workflow organization;
- Identify their own information intake style and task organization methods;
- Participants will learn to set up email practices that are conducive to managing their stress and workload, including both general strategies and practical MS Outlook tips and tricks.

Jennifer Toll, Post Award Specialist III, Saint Louis University

MOO Capstone Presentations

Special Interest

Session Level: Overview

Spark Sessions

Join mentees from the MOO 2022-2023 Cohort as they explain their capstone projects in a series of spark style presentations!

MOO 2022-2023 Cohort

Keeping Compliant with Limited Resources

PUI

Session Level: Overview

Concurrent Session

Keeping up with all the compliance regulations can be overwhelming at a small PUI with limited resources, but our schools are required to comply with all the same regulations are our larger neighbors. We will cover an overview of the major areas of compliance and the speaker will share tips on how they keep up while on their own at their small school and work toward building a community that values compliance.

- Review the major areas of research compliance
- Highlight thorny issues for PUIs
- Sources of guidance on compliance issues
- Networking to share the load

Charlotte Whited, Associate Director and Compliance Officer, Grants Office, Carleton College

6:00pm – 9:00pm **Tuesday Night Event**

Join your colleagues for food and fun at the Kirby Science Discovery Center!

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

The Hospitality Suite is open each night, offering a place to unwind and chat with colleagues.

Wednesday, May 3rd

7:30am – 9:00am **Breakfast, Concepts Expo Awards and Closing Remarks**

7:30am – 10:00am **Registration Desk**

9:00am – 10:15am **Concurrent Sessions and Discussion Groups**

Fellowship Applications

Pre-Award

Session Level: Basic | Concurrent Session

Learn about Pre and Postdoc Fellowships!

- Understand the types of fellowships
- Navigate the FOA
- Best practices for proposal preparation
- Stipend vs. Compensation

Mary Greene, Senior Manager, Preaward Services University of Notre Dame, ND Research Administration and Compliance

Lori Loftis Senior Manager, Preaward Services University of Notre Dame, ND Research Administration and Compliance

Requirements Related to Safe Work Environments

Federal

Session Level: Intermediate | Discussion Group

Federal agencies have adopted a range of requirements related to safe work environments. NIH expects us to let them know of PIs or senior/key personnel being removed from their positions or otherwise disciplined related to harassment, bullying, retaliation, or hostile working conditions. NSF and NASA have implemented terms and conditions to notify them of administrative actions, findings, or determinations for PIs or Co-Is related to sexual harassment, other forms of harassment, or sexual assault. Agencies have instituted various requirements related to conferences and off-campus or off-site research. Let's discuss these types of requirements that have emerged over the last several years and talk about how our institutions have been handling them.

- Participants will discuss the range of requirements related to safe work environments.
- Participants will share approaches their institutions have developed in response to agency requirements.

Jennifer Rodis, Compliance Manager, University of Wisconsin-Madison

Contract of Babel: Reconciling Accounting Billing and Invoicing Terms

Post-Award/Financial

Session Level: Basic

Concurrent Session

Oftentimes, contract terminology and accounting accurate billing and invoicing terms do not line up easily. This session will focus on how to ensure that accurate billing and invoicing terms are included in an agreement, and provide recommendations for ensuring that your financial system is set to compliance with those terms.

- Create a term sheet that lists acceptable billing and invoicing terms
- List three differences between contract and accounting invoicing and billing terminology
- Understand impact of irreconcilable terms on post-award invoicing

Meaghan Ventura, Senior Sponsored Projects Officer, Research Institute at Nationwide Children's Hospital

DEI Podcast Club

Professional/ Personal Development

Session Level: Overview

Discussion Group

Join us to discuss the role of research in the real world. This year, we'll be discussing four podcasts that detail the history of the HIV/AIDS epidemic and the role that researchers and their teams played (and continue to play) in saving lives--and causing harm. Please feel free to join even if you don't have time to listen to the podcasts!

- To understand the history of research in the HIV/AIDS epidemic
- To discuss and dissect the role of research administrators in historically important moments of research
- To consider what we can do to enforce JDEIA practice in our own work and within our own teams, no matter the research
- To gain a sense of community and purpose in the NCURA region IV community

The podcasts we will be discussing this year are:

- This Podcast Will Kill You: HIV/AIDS – Apathy Will Kill You
- Boghuma Kabisen Titanji: Ethical Riddles in HIV Research
- Queer America: The AIDS Epidemic, Then and Now
- Bedside Rounds: The Original (Antigenic) Sin

For more information, including links to each podcast, please visit our DEI Podcast Club page at http://ncuraregioniv.com/podcast-club.html

Lauren Gee, Pre-Award Manager, University of Wisconsin Madison

Fostering Grant Development Skills for PIs: Providing an Infrastructure for Professional Development

PUI; Pre-Award

Session Level: Overview

Discussion Group

The grant-getting process can be overwhelming; how do we prepare our PIs to be successful for their journey? Join this discussion group to hear about strategies and concepts deployed to establish a professional development infrastructure that grew from two campus to a systemwide endeavor. Come to hear and share ideas, strategies, successes and lessons learned with your peers.

- Share best practices for fostering grant-getting skills;
- Explore ideas to establish an infrastructure, scalable through collaboration;
- Launch accessible resources;
- Offer bridges to connect PIs with other subject matter experts

Kristel Seth, Director, Minnesota State University, Mankato

Jodi Kuznia, Director, St. Cloud State University

10:15am – 10:45am **Wednesday Break**

10:45am – 12:00pm **Ask the Experts Panel**

Ask the Experts Panel

Special Interest

Session Level: Basic

Panel

Our expert panel is back! Do you have a burning question that wasn't answered in sessions you attended? Did a session raise new questions you didn't know you had? Our panel of is here to help!

Kim Moreland, Associate Vice Chancellor for Research Administration, and Director, Research and Sponsored Programs, University of Wisconsin - Madison

Heather Offhaus, Director, Grant Review & Analysis Office, University of Michigan Medical School

Additional presenters to be announced soon!

12:00pm **Meeting adjourn**