

NCURA REGION IV

50TH SPRING MEETING

*Sign o' the Times: Back 2gether
and Better Than Ever*



MAY 8 – 11, 2022

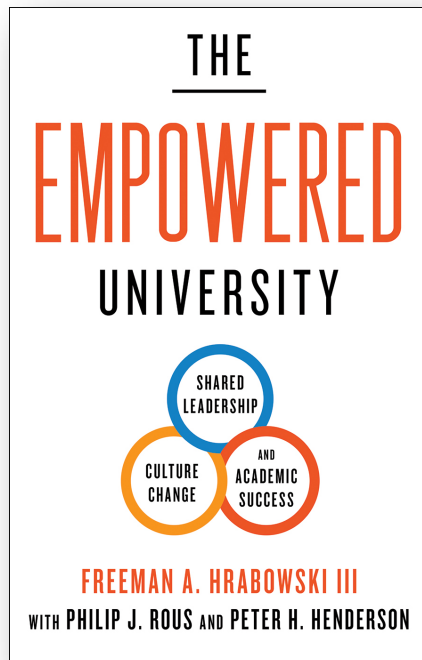
Minneapolis, Minnesota

CONFERENCE PROGRAM

2022 Minneapolis Program Committee

Program Chair	Kristin Harmon	University of Wisconsin-Madison
Program Co-Chairs	Gretchen Carnoske Amanda Gibbs Barb Bittner	Washington University in St. Louis The Ohio State University Creighton University
Workshop Coordinator	Diane Hillebrand	University of North Dakota
Track Leaders		
<i>Departmental/ Clinical/Medical</i>	Keith Page Fouza Yusuf	Washington University in St. Louis Medical College of Wisconsin
<i>Financial/Post-Award/ Compliance</i>	Dorothy Johnson Meghan Cartwright	University of Wisconsin-Madison Michigan State University
<i>Federal/Government</i>	Jennifer Rodis	University of Wisconsin-Madison
<i>Professional Development/Leadership</i>	Mario Medina Danielle Smith	University of Kansas Medical Center University of Michigan
<i>Industry/Contracts</i>	Bob Gratzl	University of Wisconsin-Madison
<i>Pre-Award</i>	Christopher Day	The Ohio State University
<i>PUI</i>	Erica Kennedy	John Carroll University
<i>eRA/Data/Metrics</i>	José Jimenez	University of Iowa
Spark Sessions/ Breakfast Roundtables	Jamie Caldwell	University of Missouri-Columbia
Concepts Expo	Kelly Sears Smith	University of Illinois Urbana-Champaign
Diversity & Inclusion Advisor	Bonnie Jean Zitske	University of Wisconsin-Madison
Meeting App Coordinator	Melanie Hebl	University of Wisconsin-Madison
Volunteer Coordinator	Diane Domanovics	Case Western Reserve University
Sponsor/Vendor Coordinator	Katie Schortgen	Eastern Michigan University

NCURA REGION IV BOOK GROUP



TUESDAY MORNING @ 9:00 AM

A practical and hopeful examination of how colleges and universities can create the best possible experience for students and faculty.

Welcome and thank you to our corporate sponsor and exhibitor:



Sunday, May 8 - Overview

7:30am – 5:00pm	Registration Desk Open and Exhibits
8:30am – 12:00pm	Morning Workshops
12:00pm – 1:00pm	Lunch (for workshop registrants)
1:15pm – 4:45pm	Afternoon Workshops
4:00pm – 6:00pm	Welcome Reception <i>Get registered and then join your friends and colleagues for refreshments and mingling.</i>
8:00pm – 11:00pm	Hospitality Suite <i>The Hospitality Suite is open each night, offering a place to unwind and chat with colleagues. A variety of board or card games will be available as well!</i>

Thank you to our institutional sponsor:



Optional Workshops, Sunday, May 8, 2022

AM Workshop: 8:30 AM – 12:00 PM

PM Workshop: 1:15 PM - 4:45 PM

All Workshops include lunch

Workshops

- 1 Introduction to Research Administration (AM Workshop)
- 2 Pre-Award Basics (PM Workshop)
- 3 Post-Award Basics (PM Workshop)
- 4 Intro and Pre-Award Basics (Full-day Workshop)
- 5 Intro and Post-Award Basics (Full-day Workshop)
- 6 An Introduction to Industry Contracting (AM Workshop)
- 7 Successful Subaward Administration from Concept to Closeout (PM Workshop)
- 8 Effective Presentations – FREE for attendees! (AM Workshop)

Workshop Descriptions

Workshops 1-5: Introduction to Research Administration

Skill Level: Basic

One body of information, five ways to learn! Pick your optimal learning track.

WS #1 (AM only): Introduction to Research Administration

WS #2 (PM only): Pre-Award Basics

WS #3 (PM only): Post-Award Basics

WS #4 (Full day): Intro & Pre-Award Basics

WS #5 (Full day): Intro & Post-Award Basics

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

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

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

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

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

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

Learning Objectives:

Introduction to Research Administration

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

Pre-Award Basics

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

Post-Award Basics

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

Presenters:



Diane Hillebrand is a Grants Manager 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 and in the central grants office at UND. Diane currently provides financial, budget and grants management support for all sponsored programs in the School of Medicine & Health Sciences at UND. Diane is very active in NCURA and has served in various volunteer roles for NCURA Region IV and Nationally. She is currently a National Board Member-at-Large, Departmental Research Administration Traveling Workshop Faculty, and just finished being NCURA Pre-award Research Administration Conference Co-Chair in New Orleans. 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 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 for NCURA. She can be reached at hmills@umich.edu.



Shannon M. Sutton, MBA, CPA, 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 vice 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.



Bonniejean Zitske is the Post-Award Chief Research Financial Officer at the University of Wisconsin–Madison. She currently oversees five post-award teams, audit coordination, the cost studies department, and the educational development program for research administrators at UW–Madison. Before moving to a central post-award position 12 years ago, she worked at both the department and dean's office level managing the entire lifecycle of an award. Bonniejean is a past Region IV Chair and currently serves as the Regionally Elected Member to the National Board of NCURA. She can be reached at bzitske@rsp.wisc.edu.

Workshop 6: An Introduction to Industry Contracting

Skill Level: Basic

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

Learning Objectives:

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

Presenters:



Bob Gratzl is the Assistant Director of Contracts at RSP. He joined the University of Wisconsin-Madison in 2011 as a Grant and Contract Specialist for the RSP Contracts Team. He and his staff on the RSP Contracts Team negotiate and execute sponsored research agreements with a variety of sponsors, including federal, non-profit, for-profit and academic partners. Bob has presented at both regional and national NCURA meetings on a wide range of research topics. He can be reached at robert.gratzl@rsp.wisc.edu



Vasanthi Pillai is the Contracts Manager at Research and Sponsored Programs (RSP) at the University of Wisconsin-Madison. Vasanthi and the RSP contracts team negotiate a variety of agreements with different types of sponsors. Vasanthi joined RSP in 2019 and has a background in research administration, the non-profit sector and private practice.

Workshop 7: Successful Subaward Administration from Concept to Closeout

Skill Level: Intermediate

Administering subawards is a process that begins with the proposal and continues through post award financial management and closeout. Successful subawards require coordinated interaction of multiple parties including the PI, department administrators, central offices, and, of course, the subrecipient. The stage is set with documenting the mutual intent of the lead recipient and subrecipient during proposal development. Following receipt of the Prime Award, the PI, department, and contracts offices at each institution must work together to develop, draft, review, and execute the subaward. Finally, the investigators, accounting staff, contracting staff, and occasionally other offices must work together to monitor subrecipient performance to ensure that the subaward contributes effectively to completion of the prime award. This workshop will explore subawards from start to finish with hands-on participation in examples and exercises.

Learning Objectives:

- Participants will learn the different stages of subaward development and administration along with the processes and parties involved at each stage;
- Develop an understanding of steps to help ensure that the subaward meets the needs of both parties and especially the prime award; and

- Learn to effectively perform subrecipient monitoring to evaluate risk to the PI and institution, gauge subrecipient performance, and address potential problems before they become serious liabilities

Presenters:



Keith Kutz is a Senior Administrator in the Office of Sponsored Programs Administration at Iowa State University. He has 34 years of experience with research administration, gained from the perspectives of sponsor, departmental administrator, and award/subaward negotiator in the central office. A member of NCURA since 2000, he is currently Co-Chair of the Region IV membership committee.



Tamara (Tammy) Polaski is an Associate Director in the Office of Sponsored Programs Administration (OSPA) at Iowa State University. She has 34 years of experience in research administration, including 27 years in central administration and 7 years of departmental experience. She currently serves as the Manager of the OSPA Awards Team and is also a senior award/subaward negotiator in the central office. Tammy is a member of NCURA since 2006.



Angie Schreck has been a Pre-Award Administrator in the Office of Sponsored Programs Administration at Iowa State University (ISU) for 2 years. Prior to this, Angie worked as a Grant Coordinator for about a year and half, also at ISU, preparing various components of a proposal in collaboration with PIs. Before joining Iowa State University, Angie worked for nearly 20 years in human services, focusing on non-profit administration in a crisis response field during the last half of that career. This work included proposal development to local, state and federal sponsors and nearly all components of award management. She has been a member of NCURA since 2019.

Workshop 8: Effective Presentations

Skill 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

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 currently serves as Chair of the NCURA Professional Development Committee (PDC). She can be reached at melanie.hebl@wisc.edu.

Monday, May 9 - Overview

7:30am – 5:00pm	Registration Desk Open and Exhibits
7:30am – 8:30am	Continental Breakfast
8:30am – 8:45am	Opening Remarks
8:45am – 10:00am	Keynote Speaker: Dr. Anton Treuer
10:00am – 10:15am	Morning Break
10:15am – 11:30am	Concurrent and Discussion Sessions
11:45pm – 12:45pm	Lunch and Career Path Initiatives Discussion
1:00pm – 2:00pm	Concurrent and Discussion Sessions
2:00pm – 2:15pm	Afternoon Break #1
2:15pm – 3:45pm	Concurrent, Discussion, and Spark Sessions
3:45pm – 4:00pm	Afternoon Break #2
4:00pm – 5:00pm	Concurrent and Discussion Sessions
5:00pm – 6:00pm	Newcomers' Reception <i>Everyone new to NCURA or new to the Regional Meeting is invited to join Region IV leadership for refreshments and to learn more about the organization. From here we will help connect you with your Dinner Group.</i>
6:00pm – 9:00pm	Dinner Groups <i>Sign-up near the Registration Desk to join other NCURA attendees and experience the local fare Minneapolis has to offer. Dinner Groups will meet in the lobby at 6:00pm for reservations at nearby restaurants.</i>
8:30pm – 11:30pm	Hospitality Suite <i>The Hospitality Suite is open each night, offering a place to unwind and chat with colleagues.</i>

Monday, May 9

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

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

8:30am – 8:45am **Opening Remarks**

8:45am – 10:00am **Keynote Speaker: Dr. Anton Treuer**



Dr. Anton Treuer (pronounced troy-er) is Professor of Ojibwe at Bemidji State University and author of 19 books. He has a B.A. from Princeton University and an M.A. and Ph.D. from the University of Minnesota. He is Editor of the Oshkaabewis (pronounced o-shkaah-bay-wis) Native Journal, the only academic journal of the Ojibwe language. Dr. Treuer has presented all over the U.S. and Canada and in several foreign countries on Everything You Wanted to Know About Indians but Were Afraid to Ask, Cultural Competence & Equity, Strategies for Addressing the “Achievement” Gap, and Tribal Sovereignty, History, Language, and Culture. He has sat on many organizational boards and has received more than 40 prestigious awards and fellowships, including ones from the American Philosophical Society, the National Endowment for the Humanities, the National Science Foundation, the MacArthur Foundation, the Bush Foundation, and the John Simon Guggenheim Foundation. Treuer is on the governing board for the Minnesota State Historical Society. In 2018, he was named Guardian of Culture and Lifeways and recipient of the Pathfinder Award by the Association of Tribal Archives, Libraries, and Museums.

10:00am – 10:15am **Morning Break**

10:15am – 11:30am **Concurrent and Discussion Sessions**

The IRB Black Hole

Financial/Post-Award/Compliance

Session Level: Intermediate

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.

- Leave with tips and tricks that can be implemented to reduce the time protocols take to get approved.

John Schwartz, Business Officer, College of Education, Criminal Justice, Human Services & Information Technology, University of Cincinnati

My Proposal Was Funded – Why Can't I Start Spending? (AKA, Why Is It Taking So Long to Get an Account Number?)

Departmental/Clinical/Medical

Session Level: Basic

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 work through the general steps to establish an award at a typical university, 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.

- A better understanding of the general award process for both federal and non-federal sponsors
- A road map with points of delay, traffic stops, and possible detours
- Communication topics that can help avoid or at least minimize delays and frustration

Keith Kutz, Senior Award Administrator, Iowa State University

Lynn Bagley, Research Administrator / VRAC Administration Manager, Iowa State University

NSF Proposal Modernization

Federal/Government

Session Level: Basic

Concurrent Session

Goodbye FastLane proposal preparation, hello Research.gov proposal preparation! NSF is transitioning all preparation and submission functionality for new proposals from FastLane to Research.gov by a target date of December 31, 2022. As additional capabilities have been added, Research.gov is very near the point where it can support all of FastLane's proposal preparation and submission tasks. Join a representative from NSF's Division of Information Systems for an overview of the Research.gov Proposal Submission System, recent and remaining planned 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, upload proposal documents, manage senior personnel, and much more using NSF's user-friendly and intuitive proposal preparation system.

- Learn why you should encourage your Principal Investigators (PIs) to transition from FastLane to Research.gov proposal preparation well before December 31, 2022
- Learn about the proposal preparation demo site and other available training resources to support the transition
- Step into the shoes of a PI and prepare a Research.gov proposal

Stephanie Yee, IT Specialist, Operations & Maintenance Lead for FastLane, Research.gov, and Grants.gov, National Science Foundation Office of Information and Resource Management, Division of Information Systems

Developing Great Leaders

Professional Development/Leadership

Session Level: Intermediate

Concurrent Session

Come and learn what it takes to develop great leaders. We will talk about skills to help others develop into great leaders and how you, as a leader, can facilitate this. You don't have to be in a supervisor role to be a great leader. Come and share your stories!

- Participants will be able to identify various mentoring styles
- Participants will learn key characteristics of being a good leader
- Participants will be able to distinguish between being a manager and a leader
- Participants will develop skills to demonstrate their leadership

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

Diane Hillebrand, Grants Manager, School of Medicine & Health Sciences – Research Affairs, University of North Dakota

In it Together: Working with Research Administrators from other Institutions

Pre-Award

Session Level: Intermediate

Discussion Group

Best practices for working with colleagues from different institutions on proposal submissions, project reporting and transfer applications. This is particularly important as we adjust to post pandemic changes to workplace environments.

- Understanding obstacles we encounter meeting internal deadlines and policies for collaborating institutions
- Empathizing and assisting each other to handle short notice
- Improving communication between research administrators

Mary Greene, Sr. Preaward Program Manager, University of Notre Dame

11:45am - 12:45pm

Lunch and Career Path Initiatives Introduction

1:00pm - 2:00pm

Concurrent and Discussion Sessions

Federal vs Non-Federal Post-Award Award Management

Financial/Post-Award/Compliance

Session Level: Intermediate

Concurrent Session

This session examines the administrative and financial similarities and differences with federal and non-federal sponsored projects. Topics covered include: reading and understanding the award notice, administrative requirements, financial management, reporting, and closeout.

- 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

Jennifer Foley, Medical College of Wisconsin

Angie Johnson, Research & Sponsored Programs, University of Wisconsin-Madison

Patient Care Costs vs. Lab/Medical Costs

Departmental/Clinical/Medical

Session Level: Basic

Concurrent Session

What are patient care costs? And why do some individuals confuse Patient Care Costs with Lab/Medical Costs or even Participant Costs and Human Subject Costs? In this presentation, we will look at the similarities and differences between these costs, and why it is important to classify them correctly on your budget. To define patient care costs, lab/medical costs, and research subject payments

- To discuss the importance of classifying costs correctly
- To compare similarities and differences between 3 different types of costs

Hang McLaughlin, Grants and Contracts Manager, University of Minnesota

USDA/NIFA Update

Federal/Government

Session Level: Basic

Concurrent Session

This session will provide a summary of the National Institute of Food and Agriculture's (NIFA) priorities, key leadership personnel, and organizational structure and functions. Some details will be shared on strategic direction and leadership team focus areas. Lastly, information on what's on the horizon for NIFA.

- NIFA Priorities
- USDA Personnel Update
- NIFA Update
- USDA Strategic Plan
- NIFA Leadership Teams
- NIFA on the Horizon

Matthew Faulkner, Director, Office of Grants and Financial Management, USDA NIFA

Daring to Lead from Wherever You Are: The New NCURA Region IV MOO Curriculum

Professional Development/Leadership

Session Level: Basic

Concurrent Session

The Chair and Co-Chair of the NCURA IV Professional Development Committee will present on the new curriculum we have introduced to the Mentoring Our Own (MOO) program this year. The curriculum emphasizes collaborative and diverse leadership for administrators of all levels, with specific strategies and tools from Brené Brown's evidence-based Daring to Lead framework. We will present with PowerPoint, pausing at key moments to workshop concepts with participants.

Kelly Sears Smith, Technical Research Writer, Department of Physics, University of Illinois Urbana-Champaign, Illini Certified Research Administrator

Dorothy Johnson, Managing Officer, Research & Sponsored Programs, University of Wisconsin-Madison

Navigating NIH F & K Award Submissions: Strategies to streamline the submission process and increase funding success for future researchers

Pre-Award

Session Level: Intermediate

Concurrent Session

NIH fellowship and career development awards help prepare individuals for careers in biomedical, behavioral, social, and clinical research. The Ruth L. Kirschstein National Research Service Award (NRSA) NIH fellowship and the career development (K) awards experience is expected to enhance the individuals' potential to develop into productive, independent research scientists. These types of awards are often the first introduction to grant writing that trainees, postdocs and junior faculty are faced with in their scientific career. Research administrators serve as a valuable resource to researchers as they navigate the F & K award submission process. In this session we will discuss how research administrators can collaboratively work together with researchers to streamline the NIH F and K proposal submission process and generate successful applications. The session will highlight NIH F and K award pre-award application requirements and provide resources for research administrators to utilize to support the proposal submission.

- Understand the fundamentals of F and K awards and the value that the awards can provide to the researcher and institutions
- Understand the fundamentals of F and K awards and the value that the awards can provide to the researcher and institution
- Identify ways to foster collaboration and strengthen partnerships with researchers to streamline F and K award submissions
- Discover institutional initiatives to increase trainee and faculty NIH fellowship and career development application success.

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

Janice S. Grace, MBA, Director, Office of Sponsored Projects Administration, Mayo Clinic

2:00pm-2:15pm

Afternoon Break #1

2:15pm-3:45pm

Concurrent, Discussion, and Spark Sessions

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

Financial/Post-Award/Compliance

Session Level: Basic / Intermediate

Discussion Group

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

After participating, attendees will:

- 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, University of Wisconsin-Madison

Katie Schortgen, Eastern Michigan University

I must be multilingual! A comparison of research administration lexicon across federal sponsors.

Pre-Award

Session Level: Intermediate

Concurrent Session

I am multilingual. And if you are at this conference, I bet you are too. Every day spent in research administration is practice learning multiple languages. Are you fluent in NIH, but still grappling with the "Broader Impact" of NSF? Can you speak USDA but find yourself reaching for a DOD dictionary? This is the session for you. Together we will explore federal sponsor nomenclature for common research administration terms. Are they really all that different? Let's find out what these different words mean for proposal development strategy and scientific review.

- Recognize sponsor-specific terms for proposal sections.
- Define common NSF and NIH terms.
- Understand how the definitions apply to proposal strategy and scientific review.

Erica M. Kennedy, MBA, CRA, Director, Office of Sponsored Programs, John Carroll University

NIH Update

Federal/Government

Session Level: Basic

Concurrent Session

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

- Learn about new and upcoming policy developments at NIH.

Adam Graham, Assistant Grants Policy Officer, Office of Policy for Extramural Research Administration, National Institutes of Health

Kasima Garst, Office of Policy for Extramural Research Administration, National Institutes of Health

Corey Taylor, Assistant Grants Compliance Officer, Office of Policy for Extramural Research Administration, National Institutes of Health

Survival Leadership: tools and tactics in challenging times

Professional Development/Leadership

Session Level: Intermediate

Concurrent Session

With so many challenges in the workforce: the great resignation, hybrid or remote workforce, training and developing, it's more challenging than ever to both recruit and retain a workforce. Come join us for an interactive session on survival tools and tactics for creating, building, and retaining a diverse workforce.

- Gain knowledge about the diversity and unconscious bias
 - Learn strategies for recruitment
 - Learn self-awareness as a leader
 - Gain knowledge on leading a remote/hybrid environment
-

- Learn competency development tools and tactics for you and your team
- Learn retention strategies

Mario Medina, Ph.D., CRA, Director, Sponsored Programs Administration, University of Kansas Medical Center

The NIH Grant Cycle: An Overview from RFA through Closeout

Pre-Award

Session Level: Basic

Concurrent Session

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 straight forward. In this presentation, 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. Though this review will not be comprehensive, we will show our participants many resources available to them to make the NIH Grant Cycle a little bit easier to manage.

- 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

Bill Courtney, Research Administrator, Office of Health Information and Data Science, Washington University in St. Louis

Kimberly Johns, Research Administrator 3, Department of Pediatrics, University of Minnesota

Region IV Mentoring Our Own

2:15 – 2:35 pm Spark Session

In this Spark Session you'll learn about NCURA Region IV's highly successful Mentoring Our Own Program, now about to launch the ninth cohort of mentees and mentors. We'll talk about how the program helps participants to develop leadership skills and create a professional network in research administration.

Kelly Sears Smith, Technical Research Writer, Department of Physics, University of Illinois Urbana-Champaign, Illini Certified Research Administrator

In State vs Out of State Employees (What are the rules of engagement?)

2:15 – 2:35 pm Spark Session

Hiring out-of-state employees can help you reach a wider talent pool. However, each state has its own rules and regulations governing the hiring process, payroll, taxes, and more. When you hire an out-of-state employee, you need to comply with that state's requirements (which may be different from your home state's). Because of this, operating in multiple states can quickly become complicated.

Jamie Caldwell, Interim Senior Director of Research Administration & Operations, University of Missouri- Columbia

Research Administration Career Path Initiative: Career Services & Media

3:00 – 3:20 pm Spark Session

In this Spark Session, we'll discuss NCURA Region IV's pilot of a new research administration career path initiative aimed at recruiting a broader and more diverse group of people into this rewarding profession. The program's initial recruitment efforts will target undergraduate and graduate students seeking career options following graduation. Career services and media are two of the approaches the pilot will use to recruit this population; internships will be discussed in a separate session.

Kelly Sears Smith, Technical Research Writer, Department of Physics, University of Illinois Urbana-Champaign, Illini Certified Research Administrator

Dorothy Johnson, Managing Officer, Research & Sponsored Programs, University of Wisconsin-Madison

Yoga at Your Desk

3:00 – 3:20 pm Spark Session

Not getting anywhere with your agency representative? No one answering your calls? Take a breather. Workplace stress is common and can hurt your productivity and your health. Did you know, without even leaving your desk, there are simple stretches you can do to relieve this tension and stress? Come prepared to stretch and breath as we practice some seated mindful movements together! No experience necessary.

Melanie Hebl, APTD, Training and Organizational Development Manager, Office of Research and Sponsored Programs, University of Wisconsin-Madison

3:45pm - 4:00pm

Afternoon Break #2

4:00pm - 5:00pm

Concurrent and Discussion Sessions

Research Administration: Staffing Challenges During a Pandemic

Financial/Post-Award/Compliance

Session Level: Intermediate

Concurrent Session

With the uptick in open Research Administration vacancies around the country, employers are seeing record high turnover now expressed as The Great Resignation. Covid has taught us that we can perform our work successfully working remotely and that we need to adapt to the changing times if we want to retain good employees and attract great new employees.

This session will first outline how to determine if your organization is understaffed, which is a crucial first step that is often overlooked and can quickly lead to employee burnout. We will discuss ideas on how to think differently when recruiting employees. We will also share ideas and creative solutions to help fill the staffing gaps and to retain existing staff while ensuring we remain in compliance with our policies, procedures, etc.

Learning Objectives:

- Determine if short staffing exists in your organization
- Discuss staffing goals

- Identify consequences of the current staffing challenges
- Review the 12 stages of burnout
- Discover creative ways employers can make their employees happy and in return want to stay employed during this challenging time
- Discover new solutions to filling the staffing gaps

Janice Grace, Director, Office of Sponsored Projects Administration

Mandi Kilcoyne, Research Administration Manager, School of Pharmacy

NIH Policy for Data Sharing and Management: An Implementation Update

Federal/Government

Session Level: Intermediate

Concurrent Session

The purpose of this presentation is to provide the research community with an update on the implementation progress of the NIH Policy for Data Sharing and Management which takes effect January 25, 2023.

- Describe Basics/Expectations of the NIH Policy for Data Sharing and Management
- Discuss Data Management Plan I-Describe resources available to the community to assist in implementation
- Provide a roadmap for 2023 and beyond with respect to data sharing

Lyric Jorgenson, Ph.D., Acting NIH Associate Director for Science Policy / Acting Director of the NIH Office of Science Policy, Office of the Director, National Institutes of Health

Paving the way for the Submission Process – Powerful Tools to Help

Pre-award

Session Level: Intermediate

Concurrent Session

Pre-award is a hectic time with an infinite list of details to check before submitting the perfect proposal to the sponsor. While the science carries the day, research administrators provide the key elements of making sure the submission is accepted and arrives at peer review in a format that will set the science in the best light. Checklists, local directions, and templates go a long way to bolstering success. Join this session to hear a journey to organizing, publishing and disseminating a suite of tools to do that.

Participants will:

- Identify common mistakes made in the submission process
- Review tools and guides intended to support the process
- Identify resources that may be used in their own institution

Jane Sierra, Associate Director of Pre-Award Services, Grant Services & Analysis
University of Michigan Medical School

What the Certification for Research Administration (CRA) can do for the Research Administrator's Career, Community, and Institution

Professional Development/Leadership

Session Level: Intermediate

Concurrent Session

Participants should have preferably three years' professional experience in research and/or sponsored programs administration. The role of the research administrator has taken many forms over the years with the expansion of science and research both domestically and internationally. Along with this dramatic growth and diversity of research comes complicated legal and regulatory requirements, complex and difficult to navigate bureaucracies, and the increased demand for public accountability. Indeed, the research enterprise today is vast and the knowledge and skills needed and required by a research administrator encompass a broad spectrum. Obtaining a CRA is a clear way to show that you have demonstrated achievement of an advanced level of knowledge and understanding of the principles, concepts and regulations for administering research.

- Gain knowledge about the CRA.
- Understand the CRA exam expectations.
- Learn eligibility requirements for the CRA.
- Take methods of promoting the CRA back to their institution.

Julie Olivero, Senior Project Representative, University of Michigan

Katie Schortgen, Manager, Grants Accounting, Eastern Michigan University

Can I Automate My Job? Intro to Excel Macros and Programming in VBA

eRA/Data/Metrics

Session Level: Intermediate

Concurrent Session

Research administration tasks can often be repetitive and leave you tired of doing the same thing a hundred times in a row, day after day, over and over....resizing columns, copying and pasting, reading one form just to fill out the same things on another form. Wouldn't it be great if your busywork could be magically completed for you at the click of a button? Well it can! You just have to make the button. How can we get financial and other data into reports using shortcuts? What other parts of our jobs could be automated to make our lives easier?

Participants will:

- Learn how macros work in Microsoft Excel
- Learn how to access the tools you need to work with macros in Excel
- Learn how to run VBA code step-by-step to watch how it works and troubleshoot errors
- Learn some coding basics like loops and variables
- Learn how to make a button and assign a macro to it

Dennis Gutman, ARC Finance Manager, Automotive Research Center, University of Michigan

5:00pm – 6:00pm

Newcomers' Reception

6:00pm – 9:00pm

Dinner Groups

8:30pm – 11:30pm

Hospitality Suite

Tuesday, May 10 - Overview

7:30am – 5:00pm	Registration Desk Open and Exhibits
8:00am – 9:00am	Continental Breakfast & Roundtable Discussions
9:00am – 10:30am	Concurrent and Discussion Sessions
10:30am – 10:45am	Morning Break
10:45am – 11:45am	Concurrent and Discussion Sessions
12:00pm – 1:00pm	Recognition Luncheon
1:00pm – 2:00pm	Poster Expo and Spark Sessions
2:00pm – 2:15pm	Afternoon Break #1
2:15pm – 3:15pm	Regional Business Meeting
3:15pm – 3:30pm	Afternoon Break #2
3:30pm – 4:45pm	Concurrent and Discussion Sessions
6:00pm – 9:00pm	Tuesday Evening Event <i>Join us to Party (Like It's 1999) at our Region IV Prom! Enjoy heavy hors d'oeuvres, and a DJ, photobooth, and costume contest as we celebrate coming back together as a region for the first time since 2019. More information below.</i>
8:30pm – 12:00am	Hospitality Suite

Tuesday, May 10

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

8:00am – 9:00am **Continental Breakfast & Roundtable Discussions**

- **Retaining Good Employees**
Claire Green-Schwartz - University of Cincinnati
- **Communication Between Departmental and Central**
Jim Maus - Washington University
- **PUI and Land Grant Institution Issues**
Shannon Sutton, Western Illinois University
- **Research Administration Career Path Initiative**
Dorothy Johnson - University of Wisconsin-Madison;
Kelly Sears-Smith - University of Illinois- Urbana-Champaign

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

Utilizing Indirect Cost Recovery & Distribution Policies to Support Faculty Development

Financial/Post-Award/Compliance

Session Level: Intermediate

Concurrent Session

With the growing reliance on extramural funding, higher education institutions are not only required to adhere to sponsored programs regulations but also make sure they have policies and procedures that foster faculty development. Researchers, administrators, and others have suggested developing processes for sharing facilities and administrative (F&A) costs recovered as one way to support scholarly activity. Utilizing results from Okstad's (2021) Facilities & Administrative Costs Study of over 140 institutional participants, this session will provide an opportunity to interact with peer institutions regarding how they have utilized indirect costs to foster and incentivize faculty development and scholarly activity.

Participants will:

- Consider how indirect cost distribution can support scholarly activity.
- Discuss the advantages and disadvantages of implementing IDC recovery & distribution policies.
- Identify ways to develop and gain support from internal stakeholders in developing IDC policies.
- Be able to apply knowledge gained to develop an IDC Recovery & Distribution Policy at their home institution.

Jonathan Okstad, Research Associate & Lecturer, Loyola University Chicago

Kira C. Dahlk, MA, Director of Sponsored Programs, Research, and External Engagement, St. Catherine University

Into the Money Multi-Verse: The Realm of Internal Funding for Clinical Trials

Departmental/Clinical/Medical

Session Level: Basic / Intermediate

Concurrent Session

This course will cover all internal funding mechanisms for under-funded Investigator Initiated (II) Clinical trials. We will also cover an in-depth description for funding NCI and Early Phase Trials

- Methods for Eligibility for under-funded trials
- Funding Mechanism rules and scoring
- Different Trial Types
- Study Progress Tracking Tools

Bethany Dupont, Research Administrator-Intermediate, Rogel Cancer Center, Michigan Medicine/Oncology-Clinical Trials Support Unit

Erin Sargent, Research Administrator-Supervisor, Rogel Cancer Center, Michigan Medicine/Oncology-Clinical Trials Support Unit

NSPM-33 Implementation Guidance

Federal/Government

Session Level: Intermediate

Concurrent Session

Research security remains a priority across the Federal government. In January 2022, the government released NSPM-33 implementation guidance (<https://www.whitehouse.gov/wp-content/uploads/2022/01/010422-NSPM-33-Implementation-Guidance.pdf>) with the stated goal of “providing clear and effective rules for ensuring research security and researcher responsibilities.” We will review the contents of the NSPM-33 implementation guidance, discuss its potential implications for our work as research administrators, and touch on institutional impacts. Come learn how this guidance will affect things ranging from preparation of other/current and pending support to required training for researchers.

- Understand the contents and scope of NSPM-33 implementation guidance
- Identify and consider implications of NSPM-33 implementation guidance

Jennifer Rodis, Compliance Manager, University of Wisconsin-Madison

Shandra White, Executive Director, Sponsored Research, Northwestern University

Export Controls and Economic Sanctions: Compliance Implications and Ideas for Universities

Industry/Contracts

Session Level: Intermediate

Concurrent Session

Join us for a discussion about the applicability of U.S. export controls and economic sanctions to university activities. This presentation will include an overview of the key regulations, practical tips and strategies for compliance, and an update about recent developments, such as the role of export controls in efforts to implement National Security Presidential Memorandum on U.S. Government Supported Research and Development National Security Policy (NSPM-33).

- Identify the three chief sets of regulations and their applicability.
- Know what university activities are most likely to create export controls or sanctions compliance risks.

- Understand the role of export controls in research security.
- Learn about recent and expected federal policy and legal developments

Pat Briscoe, Export Controls and International Projects Officer, University of Minnesota

Making the necessary research administration infrastructure accessible at a PUI

PUI track

Session Level: Basic

Concurrent Session

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

- Being able to identify relevant policies and procedures that exist or need work at their institution.
- Being able to determine the appropriate offices/personnel on their campuses to engage about specific policies and procedures.
- Being able to develop new or update existing policies and/or procedures as relevant to their institutional needs.
- Being able to determine how a PUI grants/sponsored program office can support faculty with a scholarship/research agenda.

Kristin Beck, Assistant Director - Grant Development, Northern Michigan University

Katrina Brandli, Grant Administrator, University of Miami Office of Research Administration

Regina Matheson, Ph.D., Associate Vice President, Academic Grants and Sponsored Programs, St. Ambrose University

10:30am – 10:45am **Morning Break**

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

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

Departmental/Clinical/Medical

Session Level: 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, Research Administrator / VRAC Administration Manager, Iowa State University

Keith Kutz, Senior Award Administrator, Iowa State University

NSF Update

Federal/Government

Session Level: Basic

Concurrent Session

This session will provide an update on changes to NSF proposal and award policies and procedures as well as plans for proposal submission modernization efforts.

- Learn about proposed changes to the NSF Proposal and Award Policies and Procedures Guide (PAPPG)
- Understand NSF’s roadmap for replacing FastLane with Research.gov.

Beth Strausser, Senior Policy Specialist, Division of Institution and Award Support, Office of Budget, Finance, and Award Management, National Science Foundation

The National Institutes of Health (NIH) Changing Administrative Environment - How many high priority emails do you receive from NIH?

Pre-award

Session Level: Basic

Concurrent Session

There has been a noticeable increase in the administrative burden related to submitting proposals and working with NIH grants, cooperative agreements, and contracts. Policy changes and performance expectations have led to the agency conducting more in-depth reviews of Just-in-Time information, Research Performance Progress Reports (RPPRs), unobligated balances, carry over, and other prior approval requests. Agency high priority requests for additional information, often require a response within 1-3 days. Meeting these deadlines forces researchers, departmental staff, and central office administrators to reprioritize ongoing responsibilities while gathering the requested information and coordinating a response to the agency. Join us for a lively session as we examine effective ways for departmental and central office staff with pre- and/or post-award responsibilities to navigate this changing environment.

Participants will:

- Gain a better understanding of why the administrative burden surrounding NIH proposals and awards has been increasing.
 - Raise awareness of the impact that decisions made at proposal stage have on the management of an award.
 - Be exposed to the different types of requests received and see examples that span the lifecycle of an award.
-

- Develop a clear understanding of the roles and responsibilities of NIH staff and the institution's compliance requirements in this changing environment.
- Discover best practices for managing requests from initial receipt to responding to NIH.

Brenda Egan, Managing Officer, Research & Sponsored Programs, University of Wisconsin-Madison

Dorothy Johnson, Managing Officer, Research & Sponsored Programs, University of Wisconsin-Madison

Chrissy Pientok, Administrative Associate Director, Wisconsin Energy Institute, University of Wisconsin-Madison

Useful Insights Gleaned from Audits

Financial/Post-Award/Compliance

Session Level: Intermediate

Discussion Group

This discussion group will go over highlights of what a former auditor (and now Research Administrator) and Research Administration Director think are some of the risky areas of Research Administration in relation to audits. We will talk about the Uniform Guidance, OMB Compliance Supplement, and go over a few examples of real audits and audit experiences. During this discussion we will talk about strategies for being prepared for audits to make them go as smoothly as possible.

Bonniejean Zitske, Director, Research Financial Services, Research and Sponsored Programs, University of Wisconsin-Madison

Kyle Everard, Audit Coordinator, Research and Sponsored Programs, University of Wisconsin-Madison

Exchange Not Obstruction: Achieving a 'We' Mentality in Research Administration

Professional Development/Leadership

Session Level: Intermediate

Discussion Group

Research administration is a team effort, requiring communication and cooperation from all players. Join us as we explore the complete life cycle of university research administration and the roles of our colleagues at each stage. We will discuss roles and responsibilities of departmental, school/college, and central administrators, as well as the overlaps and interdependence of those roles, with particular emphasis on how to avoid silo mentalities and "us vs them" culture.

Diane Domanovics, Assistant Vice President for Sponsored Projects, Office of Research Administration, Case Western Reserve University

Kristin Harmon, Intellectual Property Disclosure Manager, Office of the Vice Chancellor for Research & Graduate Education, University of Wisconsin-Madison

John Schwartz, Business Officer, College of Education, Criminal Justice, Human Services & Information Technology, University of Cincinnati

12:00pm – 1:00pm

Recognition Lunch

1:00pm – 2:00pm

Poster Expo and Spark Sessions

2020-2021 MOO Capstone: Communicating Your Expertise as a Research Administrator: How to Increase Your Chances of Being Seen, Heard, and Respected

Kelly Sears Smith, University of Illinois Urbana-Champaign

2020-2021 MOO Capstone: Post-Award Best Practices in Research Administration for the Department Administrator

JoAnn Urban, Washington University in St. Louis

2021-2022 MOO Capstone: Other Supports: How are we all doing them?

Brandon Stine, The Ohio State University

NCURA National's Professional Development Committee (PDC)

Melanie Hebl, University of Wisconsin-Madison

Professional Development Committee (PDC) – Mentoring Our Own Program (MOO)

Crystal James, Medical College of Wisconsin

NCURA Region IV Membership Committee

Keith Kutz, Iowa State University

NCURA Region IV Site Selection Committee

Gretchen Carnoske, Washington University in St. Louis

Flourishing in a Squiggly Career

1:00 – 1:20 pm Spark Session

Historically, career paths were modeled in the form of a ladder where growth is linear and there are few options to deviate from the well-established path laid out before us. However, in many professions today, research administration included, there are many positions and opportunities that do not follow this linear model. Helene Tupper and Sarah Ellis write in their book *The Squiggly Career*, that often-current career evolution looks more like a squiggly line. In a squiggly career we find freedom and fluidity adding a variety of relevant experiences to create our own unique and meaningful paths. Join me as we discuss this concept and how we can set ourselves up to succeed in the squiggly profession of research administration.

Melanie Hebl, APTD, Training and Organizational Development Manager, Office of Research and Sponsored Programs, University of Wisconsin-Madison

Impact of Your NCURA Membership

1:00 – 1:20 pm Spark Session

Learn more about the benefits of NCURA membership from NCURA Secretary Robyn Remotigue.

Robyn B. Remotigue, MPPA, CRA, Executive Director, Office of Research Services, School of Public Health, University of North Texas Health Science Center at Fort Worth

Audrey Nwoso, Coordinator, NCURA Membership and Volunteer Services

Tracking your Office's Workflow and Productivity (Tools, Tips and Best Practices)

1:00 – 1:20 pm Spark Session

As many of us are no longer in the same workspace together, managing and tracking work flow is even more important. Join me to discuss ways to manage work load and track productivity.

Jane Sierra, Associate Director of Pre-Award Services, Grant Services & Analysis, University of Michigan Medical School

Remote vs Hybrid Work Situations

1:30 – 1:50 pm Spark Session

We will discuss different remote and hybrid scenarios, lessons learned over the past 2 years, and best practices now and moving forward.

Katie Schortgen, Manager, Grant Accounting, Eastern Michigan University

Collaborate!

1:30 – 1:50 pm Spark Session

Learn more about how the Collaborate community can help you succeed and advance your career in research administration.

Robyn B. Remotigue, MPPA, CRA, Executive Director, Office of Research Services, School of Public Health, University of North Texas Health Science Center at Fort Worth

Audrey Nwoso, NCURA Coordinator, Membership and Volunteer Services

2:00pm – 2:15pm

Afternoon Break #1

2:15pm – 3:15pm

Regional Business Meeting

3:15pm – 3:30pm

Afternoon Break #2

3:30pm – 4:45pm

Concurrent and Discussion Sessions

Mini-Grants vs. Subawards

Financial/Post-Award/Compliance

Session Level: Intermediate

Concurrent Session

This session will explore the use of mini-grants as an alternative route for small external awards under sponsored projects. Although many sponsors offer mini-grant programs for small awards, we seldom see mini-grants used in lieu of a subaward when a project requires the PTE to award small amounts of funding to external entities. Some institutions may call these small projects 'seed grants' or other names, but they tend to have the same characteristics: the external projects do not rise to the level of a subaward, they are not procurement (vendor) actions, and they are not consulting or professional services. We will

share our experience with establishing an institutional mini-grant process and talk about several situations where that process was used to effectively disseminate funding while maintaining accountability under the prime award.

Participants will:

- Receive a refresher on how to distinguish between subawards, vendor contracts, and consulting arrangements
- Learn why and how Iowa State University developed an institutional mini-grant process
- Understand situations where mini-grants may be appropriate for specific situations

Keith Kutz, Senior Award Administrator, Iowa State University

Who wants to be Harvard anyway? Discussion of striving and the value of institutional identity

Pre-award

Session Level: Advanced

Concurrent Session

The fundamental importance of understanding institutional identity, as well as how to embrace and support it, has always played a role in effectiveness of faculty and student recruitment, talent retention and overall institutional success. The COVID crisis of the last two years has only increased the pressure on institutions, particularly those without an R1 or Ivy League label, to find and meet their unique niche. This presentation discusses the phenomenon of the "striving university," (aka Harvardization) the costs associated with striving characteristics and what university research administrators can do to define, control, and contribute to unique institutional identity. Discussion will also address the connection between those processes and effective support for faculty as they attempt to be successful in teaching, service, and scholarship in a specific university environment.

- Introduce and demonstrate the concept of the striving institution.
- Brief history of the evolution of academia in the U.S. as it relates to this phenomenon.
- Introduce and demonstrate the danger of misalignment within institutional ID.
- Review of the faculty voice in this phenomenon and institutional culture.
- Awareness of the role university research administration offices (can) play in sculpting a supportive environment in which faculty perceive themselves to be successful.

Dr. Erica L. Goff, Director, Office of Research Development and Administration, Eastern Michigan University

The Importance of Intellectual Property, U.S. Manufacturing and Research Security in a Hypercompetitive World

Federal/Government

Session Level: Intermediate / Advanced

Concurrent Session

A discussion of DOE's Research Security and enhanced U.S. manufacturing policies

DOE Research Security Policies:

- An Overview of DOE's Research Security Policies including DOE's Conflict of Interest policy, S&T Risk Matrix and DOE Order 142.3B
- The important balance between maintaining open and collaborative research and addressing research security threats using a risk-based approach

USM Background: On June 8, 2021, in connection with the 100-day review of critical supply chains as directed under E.O. 14017, America's Supply Chains, DOE's Science and Energy Determination of Exceptional Circumstances (S&E DEC) was announced as part of a series of

new policy actions to support U.S. job creation and bolster the domestic manufacturing supply chains

- Challenges associated with 35 U.S.C. 204 and the need for secure domestic supply chains for critical and emerging technologies
- The DEC Authority and the scope of the DOE'S S&E DEC
- Updates and clarifications regarding DOE's DEC. Hint: DOE will not be requiring the approval of exclusive or non-exclusive licenses! DOE has also updated its change of control language
- Obtaining a modification or waiver of these enhanced requirements

Brian Lally, Assistant General Counsel for Technology Transfer and Intellectual Property, United States Department of Energy

Alright, Alright, Alright: Avoid Being Dazed and Confused by Clauses of Concern in Sponsored Research Agreements

Industry/Contracts

Session Level: Intermediate

Concurrent Session

Negotiating clauses of concern in sponsored research agreements is a core part of the job for contract negotiators. This session provides an overview of some of the most common agreement terms that pose special challenges for non-profit institutions of higher education and presents a conceptual framework for negotiating these terms in accordance with institutional policy.

Participants will:

- Identify "clauses of concern" in sponsored research agreements and understand why these clauses are important.
- Learn how universities identify, assess, and evaluate the risk of accepting particular terms and conditions.
- See how "It depends" is applied in the negotiation process by conceptualizing agreement terms as ideal, acceptable, or undesirable.

Paula Jorge, Associate Director, Negotiations, University of Illinois Urbana-Champaign

Justin Blount, Senior Negotiator, University of Illinois Urbana-Champaign

Embracing Allyship as a Research Administrator

Special Interest

Session Level: Basic

Discussion Session

Have you heard of the word allyship before? What does it mean to you? Have you ever considered what it means to be both an ally and a research administrator? This session will explore the intersection of allyship and research administration by examining ways in which we, as research administrators, can create space for underrepresented folks to do their best work.

Bonniejean Zitske, Director, Research Financial Services, Research and Sponsored Programs, University of Wisconsin-Madison

6:00pm – 9:00pm

Tuesday Night Event



REGION IV PROM

Join us for music, food, and fun!

Heavy hors d'oeuvres will be served.

Take photos with your friends and colleagues in our photo booth.

Costume contest at 8 pm

COSTUME CONTEST CATEGORIES:

Best Prince Impersonation

Most Purple Outfit

Most 90's Outfit

Best Classic Prom Outfit

Best Region IV Spirit Wear Outfit

9:00pm – Midnight

Hospitality Suite

Wednesday, May 11 - Overview

8:00am – 10:00am	Registration Desk Open and Exhibits
8:00am – 9:00am	Hot Breakfast Buffet & Roundtable Discussions
9:00am – 10:15am	Concurrent and Discussion Sessions
10:15am – 10:45am	Morning Break
10:45am – 12:00pm	Moderated Panel Discussion Ask The Experts! Burning Questions in Research Administration
12:00pm	Conference Adjourns

**Thank you for making
Region IV and this
Spring Meeting a great
experience!**

Wednesday, May 11

8:00am – 9:00am

Hot Breakfast Buffet, Roundtable Discussions, and Closing Remarks

- **Post Award Issues**
Sandy Fowler - University of Wisconsin-Madison
- **Open Discussion**
Kelly Andringa, PhD, MBA - Research Manager | Department of Orthopedics & Rehabilitation - University of Iowa
- **Research Administration Career Path Initiative**
Dorothy Johnson - University of Wisconsin
Kelly Sears Smith - University of Illinois Urbana-Champaign

8:00am – 10:00am

Registration Desk

9:00am – 10:15am

Concurrent and Discussion Sessions

Research Administration Career Path Initiative: Student Internships as an Introduction to Research Administration

Special Interest

Session Level: Intermediate

Concurrent Session

NCURA Region IV is piloting a new research administration career path initiative aimed at recruiting a broader and more diverse group of people into this rewarding profession. The program's recruitment efforts will target undergraduate and graduate students seeking career options following graduation. Student internships are one avenue institutions can use to introduce students to research administration. These opportunities are mutually beneficial in that they provide students with training in the soft and technical skills required to launch successful careers while colleges and universities have additional staffing resources to support research at a reasonable cost.

Join us for a discussion about the internship program in the Office of Research and Sponsored Programs at the University of Wisconsin-Madison. Learn how it has evolved over the last decade into an essential part of the staffing structure and become a viable career path for students. We will share best practices and lessons learned as the program has continued to evolve in this rapidly changing labor and compliance environment. Tools for other institutions to use when implementing internship programs will be discussed and we look forward to learning what other institutions have done.

Participants will be able to:

- Identify the components of a successful internship program utilizing students to do research administration tasks
- Describe best practices and lessons learned in implementing and running a student internship program
- Specify different types of internships and areas of responsibility conducive to utilizing student assistance

- Envision a what a student career path may look like and how it impacts the profession in the long-term
- Be exposed to the different types of requests received and see examples that span the lifecycle of an award

Dorothy Johnson, Managing Officer, Research & Sponsored Programs, University of Wisconsin-Madison

Angie Johnson, Managing Officer, Research & Sponsored Programs, University of Wisconsin-Madison

Using Metrics and Data to Achieve Your Research Goals

eRA/Data/Metrics

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?

In this session attendees will:

- 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

Claire Green-Schwartz, Accelerator Facilitator/Research Manager, University of Cincinnati

Emily Bacon, Research Associate, University of Cincinnati

Superpower Training for Research Administrators

Pre-award

Session Level: Intermediate

Discussion Group

Research Administrators need superpowers to make things happen while multi-tasking all day long. How can we provide superpower training for new RAs? The onboarding of research administrators can be daunting for both the RA and the PIs. How can this be simpler for everyone? What tools would be useful? What tools do you wish you had? What superpower training are you providing or wish you could take?

Please join us to discuss ideas and share thoughts on how we can train research administrators to develop superpowers!

Christy Schulz, Senior Research Administrator, Dean's Office, School of Medicine and Public Health, University of Wisconsin-Madison

Calleen Roper, Associate Director for Research, Department of Medicine, School of Medicine and Public Health, University of Wisconsin-Madison

The Empowered University - Book Group

Special Interest

Session Level: Basic

Discussion Group

Join your colleagues and share what you learned, your reactions, and your insights after reading The Empowered University, by Freeman A. Hrabowski III.

Bonniejean Zitske, Director, Research Financial Services, Research and Sponsored Programs, University of Wisconsin-Madison

10:15am – 10:45am

Morning Break

10:45am – 12:00pm

Concurrent and Discussion Sessions

Ask The Experts! Burning Questions in Research Administration

Special Interest

Session Level: Basic

Moderated Panel

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 experts in the field will take on your thorny issues and niggling questions.

Join Jim Maus as he mediates a panel of RA experts, including Jamie Caldwell, Kim Moreland, and Heather Offhaus.

Jim Maus, CRA, Grant Specialist, Department of Orthopaedic Surgery, Washington University School of Medicine

Jamie Caldwell, Interim Senior Director of Research Administration & Operations, University of Missouri- Columbia

Kim Moreland, Assoc. 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

12:00pm

Adjourn

See you in Sioux Falls,
South Dakota, in 2023!