THE FUTURE'S SO BRIGHT

NCURA Region IV | May 4 -7 | Chicago, IL

FINAL SCHEDULE

April 2025

MONDAY MAY 5

SESSION BLOCK #1 10:30 – 11:30AM

CONTRACTING FOR CLINICAL TRIALS: A PRIMER

Track: Contracting **Type**: Concurrent **Level**: Basic

This session will present an overview of the most common elements of a successful clinical trial contract that supports the needs of an academic institution, while also respecting the aims and goals of industry sponsors. The presenters will cover the fundamentals that need to be addressed in most contracts. Attention will also be given to best practices at the negotiating table and working with investigators and their study teams to connect the dots from science to contract.

LEARNING OBJECTIVES

- Participants who are involved in the contracting process will be able to identify hot button issues, and will come away with fresh perspectives and solutions to common challenges. Those attendees that do not directly negotiate the contracts will nevertheless learn to assess human research projects for areas of concern which they can bring back to their institutions for further discussion.

Andy Stelling, Senior Grants & Contracts Administrator, University of Missouri – Columbia
Lindsey Conrad, JD, Research Contracts Associate, University of Missouri – Columbia

ARE YOU MOCKING ME?!: AN EXERCISE IN MOCK SCORING PROPOSALS

Track: Pre-Award/Research Development **Type**: Concurrent **Level**: Advanced

RFPs are the most important guide to developing your proposal. But they are often full of complex and sometimes confusing requirements. Identifying proposal criteria early can drive success throughout the development process. Simulating the scoring process of a panel reviewer prior to submission can improve your proposal's competitiveness. Let us show you how!

LEARNING OBJECTIVES

- Attendees will understand how to look for proposal requirements and scoring criteria within RFPs/solicitations.
- Attendees will successfully engage in a mock scoring exercise to practice skills taught in session.
- Attendees will have the knowledge and skills to implement mock scoring at their institution to strengthen proposal quality.

Krysta Knox, Graduate Research Assistant, University of Cincinnati
Lauren Jaeger, Graduate Research Assistant, University of Cincinnati

FOSTERING FACULTY DEVELOPMENT: HOW INDIRECT COSTS CAN SEED SCHOLARLY INITIATIVES

Track: Organizational and Executive Leadership **Type**: Concurrent **Level**: Advanced

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 the Facilities & Administrative Costs Study (2021) 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 have the opportunity to include their own institution to compare with peer institutions.

LEARNING OBJECTIVES

- 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, Manager of Research Administration, Northwestern University
Kira Dahlk, Director of Sponsored Programs, Research and External Engagement, St. Catherine University

FEDERAL VS NON-FEDERAL POST-AWARD MANAGEMENT

Track: Post-Award/Financial **Type**: Concurrent **Level**: Intermediate

The session examines the administrative and financial similarities/differences of federal and non-federal sponsored projects. Participants will review key elements of award documents to understand responsibilities and requirements for awards.

LEARNING OBJECTIVES

- Review key elements in an award document.
- Learn Uniform Guidance applicability.
- How to prevent delays in award setup and reconciliation stages.

- Understand administrative, reporting, and closeout requirement differences.
- Learn financial and subcontracting considerations between award types.

Angie Johnson, Assistant Director, Sponsored Programs, University of Wisconsin – Madison
Chelsie Propst, Post-Award Accountant II, University of Wisconsin-Madison

STOP DOING THE WORK YOU HATE: A GUIDE TO CREATING EFFICIENT (AND AUTOMATED!) RESEARCH OFFICE PRACTICES

Track: Systems, Date, and Artificial Intelligence**Type**: Concurrent **Level**: Intermediate

Ready to transform your office processes from cumbersome to cutting-edge? Join us for an engaging discussion where we'll talk about how to harness the power of no-code tools to simplify and enhance the work you do. In this session, you'll see how the University of Minnesota's College of Veterinary Medicine has used a variety of platforms and programs to reduce the manual tasks involved with their work. Whether you're new to automation or looking to refine your existing processes, this session will provide valuable strategies to transform your workflow and demonstrate that achieving efficiency is within reach for everyone. Come ready to revolutionize the way you work!

LEARNING OBJECTIVES

- The advantages of automating research office processes and the impact on cost savings, efficiency, compliance, reporting, and decision-making.
- Practical examples of how to use no-code tools effectively, including tips on leveraging Excel formulas to maximize functionality.
- How to achieve significant cost savings, whether you choose paid apps or free versions to kickstart your journey.

Shannon Kasperson, Administrative Director, University of Minnesota College of Veterinary Medicine
Kinsey Mannebach, Internal Grants and Events Coordinator, University of Minnesota, College of Veterinary Medicine

IT'S YOUR TURN - GRANT-WRITING AS PROFESSIONAL DEVELOPMENT FOR RESEARCH ADMINISTRATORS AT PUIS

Track: PUI and ERI **Type**: Concurrent **Level**: Intermediate

The presenters will share their recent experience applying to NSF's GRANTED program.

- Find time to work on grant proposals. Use tools (e.g., DMP and Broader Impacts templates).

- Follow the best practices we advise faculty (serve as a program reviewer, get feedback from colleagues, collaborate). Understanding benefits and professional development.
- Find grants relevant to research administrators/sponsored programs.
- Help lead proposal development for institutional initiatives.

Heather Johnson Schmitz; Manager of Grants and Contracts; University of Wisconsin-Eau Claire
Esther Eke; Director, Office of Sponsored Programs; University of Wisconsin Oshkosh

I LOVE LEADING A TEAM; I HATE SUPERVISING PEOPLE

Track: Professional Development, Inclusion, and Engagement **Type**: Discussion **Level**: Advanced

Discussion about dealing with supervision problems/issues that arise

Hang McLaughlin; Grants & Contracts Manager; University of Minnesota

SESSION BLOCK #2 1:00 – 2:00 PM

BUILDING BRIDGES - PRE-AWARD AND POST-AWARD AT PUI/ERI

Track: PUI and ERI **Type**: Concurrent **Level**: Overview

The relationship between Pre-Award and Post-Award is sometimes framed as adversarial. In this session, we will work to change that narrative and work together to build a partnership that can mutually benefit both sides of the house.

LEARNING OBJECTIVES

- Understand why the pre and post relationship matters
- Evaluate your own institutional landscape
- Learn strategies to build and maintain a positive relationship

Becky Muller; Associate Research Administration Director; University of Wisconsin-Whitewater
Abby Guillory; Assistant Vice President for Research; University of Tulsa

RESEARCH (IN)SECURITY: PREPARATION FOR IMPLEMENTATION OF RESEARCH SECURITY PROGRAMS

Track: Federal/Sponsors/Agencies **Type**: Concurrent **Level**: Intermediate

Come join our conversation on the current state of research security program implementation, including the latest developments from federal funding agencies, institutional challenges, and other legislative/regulatory updates. Participants should come prepared to share about their own institutional experiences. Let's discuss common compliance challenges and steps institutions are considering as they develop their programs.

LEARNING OBJECTIVES

- Gain an understanding of recent legislative, regulatory, and policy updates in regard to research security program implementation
- Share information about their institutional experiences
- Explore ways in which institutions are developing their research security programs

Jennifer Rodis, Director of Strategic Support, University of Wisconsin Madison, Office of Sponsored Programs
David Mulder, Assistant Director, Regulatory Affairs, University of Michigan Medical School

EFFECTIVE COMMUNICATION WITH PIS AND THEIR RESEARCH TEAMS…IS THIS EVEN POSSIBLE?

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

As a research administrator, have you ever had non-productive, difficult, or negative communication with a faculty or other researcher who came to you for assistance? Have you worried that this is because of something you did wrong in your communication? Would you like to learn some tips and tricks to assist with future conversations and discussions with your faculty and their research teams? If so, then this is the session for you to attend! During the presentation and active discussion, you will hear experiences other RAs have had and how they handled them. You will also learn the tips and tricks they have discovered that they use as best practices now in creating and fostering positive, effective, and professional relationships with those they serve both in the pre- and post-award arenas.

LEARNING OBJECTIVES

- Discover ways to build trust with your faculty and others
- Understand how research administrators navigate the difficult conversations
- Hear best practices, tips, and tricks from the presenters and attendees as they discuss their own experiences

Lynn Bagley, VRAC Research Administrator & Business Manager, Iowa State University
Keith Kutz, Senior Award Administrator, Office of Sponsored Programs Administration, Iowa State University

PAINLESS PRE-AWARD PROCESSES -- YES, IT IS POSSIBLE!

Track: Pre-Award/Research Development **Type**: Concurrent **Level**: Basic

Whether you are new to the field, or more experienced but looking for more tools to tame a growing, or more complex, research portfolio, developing a set of Standard Operating Procedures (SOPs) and forms may be what you need to feel less daunted by your workload!

LEARNING OBJECTIVES

- Learn how developing SOPs and pre-award intake forms can ease your workflow, keep you on schedule, and make gathering information from PIs more efficient. Examples galore!

Renee Hill, Research Operations Administrator, University of Nebraska Medical Center-CON
Bruxanne El-Kammash, Sponsored Development Manager, The University of Chicago

NAVIGATING CHANGE: BUILDING RESILIENCE AND ADAPTABILITY IN RESEARCH ADMINISTRATION

Track: Organizational and Executive Leadership**Type**: Concurrent **Level**: Overview

Change is inevitable in research administration, whether it involves new funding regulations, technology shifts, or organizational restructuring. This session will address the challenges research administrators and managers face when navigating transitions in the workplace. Attendees will learn strategies for managing both personal and team responses to change, fostering a culture of adaptability, and using change as an opportunity for growth. With a focus on leadership, communication, and emotional intelligence, this session will offer tools for successfully leading through uncertainty.

LEARNING OBJECTIVES

- Understand the psychological and organizational impact of change in research administration.
- Develop effective communication strategies for managing resistance and fostering openness to change.
- Learn techniques for building resilience and adaptability in yourself and your team.
- Explore how to leverage change as an opportunity for professional growth and improved processes

Mario Medina, Senior Director, Sponsored Programs Administration, University of Kansas Medical Center
Matt Morgan , Director SPA Accounting, University of Kansas Medical Center

WHO WANTS TO PLAY? "POST AWARD ACTIONS!"

Track: Post-Award/Financial **Type**: Discussion **Level**: Overview

Audience Members will be invited to participate in a fun interactive game in the style of "Who Wants To Be A Millionaire" and “Taboo” (Post Award style). The individual/team will try to answer the questions to get to the final answer, but can utilize the options: 50/50, ask a friend, and poll the audience. How much do you know about Post Award????

Melanie Walker, Senior Post Award Research Manager, The University of Chicago
Doretha Henderson, Senior Post Award Research Manager, The University of Chicago

ASK ME ANYTHING... ABOUT THE NSF HERD SURVEY

Track: Systems, Date, and Artificial Intelligence**Type**: Discussion **Level**: Overview

The NSF HERD survey is an annual survey that collects data on the R&D expenditures that our domestic institutions spend. The survey data can be used for a variety of purposes, from benchmarking to trend analyses to goal-setting. In this conversational session, you can ask anything about HERD that has confused you or interested you. Hansa Magee leads this session and she has submitted the HERD survey for two R1 institutions for over 9 years. She will have general HERD topics that she will cover if you don't have any questions during this session. If you have questions or topics you'd like her to consider beforehand, please email her at hansa.magee@missouri.edu at least a week prior to NCURA Chicago!

Hansa Magee, director of research analytics, University of Missouri-Columbia

SESSION BLOCK #3 2:15 – 3:15 PM

OVERCOMING IMPOSTER SYNDROME IN RESEARCH ADMINISTRATION: STRATEGIES FOR CONFIDENCE AND SUCCESS

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent **Level**: Overview

Many professionals in research administration and management face feelings of self-doubt and inadequacy, commonly referred to as imposter syndrome. This session will explore the causes of imposter syndrome, its impact on career development, and how it can particularly affect you throughout your career. Through discussions, reflective exercises, and practical strategies, attendees will learn how to build confidence, embrace their expertise, and foster a supportive work environment that combats imposter feelings. Real-life experiences and success stories will also be shared.

LEARNING OBJECTIVES

- Identify the signs and triggers of imposter syndrome in the research administration context.
- Explore the impact of imposter syndrome on career progression and decision-making.
- Develop practical tools and strategies to overcome self-doubt and foster self-confidence.
- Learn how to create a supportive culture that helps colleagues manage imposter syndrome in your institution.

Melissa Taylor; Senior Business Manager; Purdue University Office of Research
Sandy Fowler; Assistant Dean for Research; University of Wisconsin Madison

GRANT ME A WISH: EDUCATING FACULTY ON THE RESEARCH ADMINISTRATOR'S ROLE

Track: Pre-Award/Research Development **Type**: Concurrent **Level**: Intermediate

Leveraging experience and knowledge to teach faculty, especially junior ones, to understand what role research administrators play in their grants and research projects and what responsibilities each party has for successful research.

LEARNING OBJECTIVES

- Participants will be able to effectively communicate their role and responsibilities in a manner accessible to non-RA professionals
- Participants will have tools to ensure their faculty understand the context of research administration and the reasoning behind the procedures used in pre-award

Ali Adams, Research Administrator, Washington University St. Louis

INSTITUTIONAL TRAINING GRANT POST AWARD MANAGEMENT

Track: Post-Award/Financial **Type**: Concurrent **Level**: Basic

Congratulations! All that hard work paid off and your faculty member was just awarded an institutional training grant from NIH. Now what? This session is your crash course on post award management for T32 training grants! We'll break down the post award rules and regulations, and share tips on managing these awards effectively.

LEARNING OBJECTIVES

- Identify key post award requirements for T32s, such as restrictions for appointments, RPPR procedures, and xTrain usage.
- Ensure financial compliance with NIH guidelines for T32s.
- Anticipate common challenges associated with T32 management and develop strategies for mitigating these challenges.

Michael Sulivan, Research Administrator, Washington University in St. Louis
Devin Bennett, Manager Sponsored Projects Accounting, Washington University in St. Louis

SUPPORTING EFFECTIVE INSTITUTIONAL RESPONSIBLE CONDUCT OF RESEARCH AND RESEARCH SECURITY EDUCATION/TRAINING PROGRAMS

Track: Research Compliance and Ethics **Type**: Concurrent **Level**: Basic

This session will provide attendees an orientation to federal agency Responsible Conduct of Research (RCR) and Research Security (RS) training requirements and offer examples of best practices to implement effective programs at their institutions.

LEARNING OBJECTIVES

- Understand federal requirements for Responsible Conduct of Research (RCR) and Research Security (RS) training for affected individuals.
- Apply best practices for compliance in RCR and RS institutional education programs

Dr. Christopher Lehmann, Research Integrity Officer, University of Illinois, Urbana-Champaign

ARPA-HELP! PROPOSAL PREPARATION INSIGHTS FOR THE NEW FEDERAL AGENCY ARPA-H

Track: Pre-Award/Research Development **Type**: Concurrent **Level**: Intermediate

ARPA-H attracts many researchers with its lofty goals and large purse. Launched in 2022, the new Advanced Research Projects Agency for Health aims to transform U.S. health and medicine by supporting breakthroughs not readily accomplished through traditional research or commercial support. But researchers may be surprised to find that ARPA-H is not the same as NIH. With its moonshot goals, outcomes-based performance expectations, and complex requirements, ARPA-H stretches the skills of researchers and admins alike. Don't get us started on the turnaround time!
This session will help research administrators prepare for their first ARPA-H encounters. We will provide an overview of the agency, review programmatic expectations, and outline budget requirements. We will explore best strategies for proposal preparation, including checklist and template creation and other ways to prepare the team for submission. Finally, we will discuss the award negotiation process, which often requires proposal revision.

LEARNING OBJECTIVES

- Understand the aims and goals of the ARPA-H and its 4 Missions.
- Have a concept of the strategy required for ARPA-H applications.
- Understand agency standard procedures and requirements.
- Identify strategies for organizing proposal documents and preparing the team for submission.
- Gain an understanding of the award negotiation (just-in-time) process.

Patience Graybill, Senior Research Development Associate, Washington University St. Louis
Christine Tilley, Associate Director of Research Administration, Washington University St. Louis

CHANGE MANAGEMENT

Track: Organizational and Executive Leadership**Type**: Discussion **Level**: Intermediate

This discussion group will be created as a follow on to the change management sessions in succession planning, new systems, and post-COVID.

Mario Medina, Senior Director, Sponsored Programs Administration, University of Kansas Medical Center
Matt Morgan , Director SPA Accounting -University of Kansas Medical Center

QUESTIONS OF MORAL AND ETHICAL CONCERNS FOR RESEARCH ADMINISTRATORS: CAN WE REFUSE TO SUBMIT A PROPOSAL OR MANAGE AN AWARD?

Track: Departmental **Type**: Discussion **Level**: Advanced

Have you ever submitted a proposal, or have you been asked to manage an award that you have deeply held moral or ethical concerns about? Can you tell your supervisor that you don't want to submit that proposal or manage that award? Does your institution have a policy covering this situation? In this discussion group, we will talk about this unusual situation. We recommend anyone who would like to attend to check with their institution to identify any policy that you can bring to the discussion.

Bill Courtney, Research Administrator, Washington University in St. Louis
Beth Woods, Associate Director, Grants and Contracts, Center for Biomolecular Sciences, University of Illinois Chicago

SESSION BLOCK #4 3:45 – 4:45 PM

HOW ANALYTICS CAN INCREASE EFFICIENCY IN RESEARCH ADMINISTRATION

Track: Systems, Date, and Artificial Intelligence**Type**: Concurrent **Level**: Basic

Administrative staff from the University of Missouri, Northwestern University, University of Illinois Chicago, and the Medical College of Wisconsin have come together for a dynamic panel discussion to discuss the power of data-driven analytics in research administration. The panelists, composed of experienced analysts, directors, and research grant coordinators, will share real-world success stories of how analytics have produced efficiencies in research administration. Additionally, panelists will provide insights into the initial steps for adopting research analytics, establishing robust reporting metrics, and integrating analytics to support strategic university initiatives.

LEARNING OBJECTIVES

- Understand how analytics can improve the efficiency of research administration processes. Additionally,
- Learn best practices for reporting and analyzing key metrics in research administration.

Kimberly Griffin, Director of Research Analytics, Northwestern
Hansa Magee, Director of Research Analytics, University of Missouri-Columbia

KEY CONTRACT CONSIDERATIONS FOR INDUSTRY SUPPORTED INVESTIGATOR-INITIATED CLINICAL TRIAL AGREEMENTS ("IITS")

Track: Contracting **Type**: Concurrent **Level**: Overview

This session focuses on negotiation positions for IITs and how you can incorporate these positions when negotiating with industry partners. It is important to recognize that the preview of agreements from a typical sponsor initiated clinical trial agreement (“CTA”) to an IIT is really a spectrum of options that will be negotiated by the parties. This session will offer training on recognizing the critical elements of IITs, analyzing negotiation strategies, identifying individual strengths and weaknesses and comparing common mistakes made by contract officers on each side of the table.

LEARNING OBJECTIVES

- Master the key contract terms for investigator-initiated clinical trial agreements, supported by practical case studies and negotiation tips;
- Dive into critical components such as subject injury, indemnification, publication, and intellectual property clauses for IITs with multiple funders or vendors; and

- Identify risks, set clear parameters, and establish walk-away points so that research administrators can negotiate IITs more successfully and ensure that the final agreement aligns with the institutional goal and risk tolerance.

Avril Liu, Associate Director of Sponsored Programs - Contracts, University of Illinois Chicago
Adrienne R. Lundquist, Associate Director, Contracts & Negotiations, Northwestern University

SMALL SCHOOLS BIG SCIENCE

Track: PUI and ERI **Type**: Concurrent **Level**: Overview

Federal sponsors of scientific research, particularly the NIH and NSF, recognize the role that small colleges play in the development of future research scientists and expansion of the STEM workforce. To that end, these agencies offer funding opportunities designed specifically for small colleges. In this session, we will discuss the unique funding opportunities available to small colleges and how to create successful proposals.

LEARNING OBJECTIVES

- Name the funding opportunities benefitting small institutions
- Describe how these opportunities are relevant to their own institution
- Recognize some key strategies for proposal development

Jeffery Ritchie, Director of Sponsored Programs, Hamilton College
Michelle Galasso; Assistant Vice President for Corporate, Foundation, and Sponsored Research Support; North Central College

5 YEARS LATER - HOW COVID CHANGED THE WAY WE WORK

Track: Organizational and Executive Leadership**Type**: Concurrent **Level**: Intermediate

Panel discussion with focus on reflecting on the ways COVID has transformed our work environments, management strategies, and institutional practices, as well as looking ahead to the future. Topics to be covered include:

- Remote, Hybrid, or In-Person?
- Team Management in a New Era
- Leadership Impact Post-COVID
- Success Benchmarks for Leadership
- System Improvements and Implementations
- Ongoing Challenges in Systems Implementation

Moderator: Liz Grinstead, Post Award Research Specialist, The University of Chicago

Panelists:
Glenda Bullock, Senior Director, Research Administration, Washington University in St. Louis
Heather Offhaus, Director Grant Review & Analysis, University of Michigan Medical School
Kathy Durben, Executive Director Office of Research and Sponsored Programs, Marquette University
Stephanie Wilbrand, Research Administrator & Clinical Research Program Manager, University of Wisconsin School of Medicine and Public Health

THE VALUE OF CREDENTIALS FOR GRANT PROFESSIONALS IN HIGHER EDUCATION

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent

Level: Intermediate

The speakers will present the perspectives of an employee and of a consultant serving Higher Education institutions, and the benefits they believe a credential brings and the resulting advantages.

LEARNING OBJECTIVES

- Understand the difference between a credential and other forms of training (certificate)
- Recognize how a credential is helpful for work in sponsored research and higher education grants
- Understanding the various certifications: GPCI (GPC), RACC (CRA, CPRA, CFRA) NGMA (CGMS), AFP (CFRE)
- Gain insights into the impact of the GPC and other certifications for two higher education grants professionals (employee and consultant)

Jillian Veil-Ehnert; Director of Foundation Relations & Research Grants; Concordia College, Moorhead, MN
Maureen Stabile, GPC; Grants & Special Projects Coordinator; Kim Joyce & Associates, LLC

ARPA-WHAT-THE-"H"?! A DISCUSSION ABOUT BEST PRACTICES FOR PREPARING AN ARPA-AGENCY PROPOSAL AND AWARD NEGOTIATION

Track: Pre-Award/Research Development **Type**: Discussion **Level**: Intermediate

An investigator informs you that their white paper has been accepted for submission by one of "ARPA" agencies. The full proposal is due in 4 weeks. You read the solicitation, and your mind is blown by the complex requirements. You realize that proposal preparation really needs twice as much time. Furthermore, the PI has no idea how to approach the requirements. Others have told you that the award negotiation stage is also challenging.

This discussion session will ask participants to share what they have learned from their experiences submitting to ARPA-H or other ARPA- agencies. What do you need to know about these contracting agencies and their requirements for proposals? What are some tips and tricks for managing the complex process and quick turnaround? How does one prepare the PI and get information needed from the technical team in a short time frame? What are best practices for the award negotiation process?

Patience Graybill, Senior Research Development Associate, Washington University St. Louis
Christine Tilley, Associate Director of Research Administration, Washington University St. Louis

THE IRB BLACK HOLE: TIPS TO REDUCE THE TIME A PROTOCOL IS LOST IN SPACE

Track: Research Compliance and Ethics **Type**: Concurrent **Level**: Intermediate

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

LEARNING OBJECTIVES

- Understand IRB average protocol review times.
- Gain knowledge on what causes delays in IRB reviews.
- Learn tips for reducing IRB protocol approval delays

John Schwartz, University of Cincinnati, Executive Business Officer, Division of Academic Affairs

TUESDAY

SESSION BLOCK # 5 9:00 – 10:00 AM

GRANTS COMPLIANCE: COMMON THEMES OF NASA OIG INVESTIGATIONS

Track: Federal/Sponsors/Agencies **Type**: Concurrent **Level**: Overview

The NASA Office of Inspector General will present common compliance issues and fraud schemes that research entities should be aware of, as well as discuss lessons learned from completed criminal and civil fraud investigations.

Todd Angle, Special Agent, Office of Investigations, NASA
Breyah Evans, Special Agent, Office of the Inspector General, NASA

BUDGET WORKSHEETS: MAKING EXCEL WORK FOR YOU

Track: Post-Award/Financial **Type**: Concurrent **Level**: Basic

Microsoft Excel is a tool that is available to most Research Administrators. However, it can often be under utilized. At the Van Andel Institute we have been able to increase efficiency by creating templates for proposal budgeting that populate the fields for the SF424, communicate award budget changes to be added to finical system, and do budget projections for PIs.

LEARNING OBJECTIVES

- Demonstrating that MS Excel can help with budget and communication efficiencies at a time when Research Administrators are short of staff and resources.

Timothy DeHaan, Sponsored Research Analyst III, Van Andel Institute

Betsy VanKlompenberg, Sponsored Research Analyst III, Van Andel Institute

Trista Bernheisel, Accountant III, Van Andel Institute

QUANTUM COMPLIANCE – COLLABORATING WITH RESEARCHERS TO DRIVE COMPLIANCE PROGRAM GROWTH

Track: Research Compliance and Ethics **Type**: Concurrent **Level**: Advanced

In September of 2024, The U.S. Department of Commerce's Bureau of Industry and Security published an interim final rule creating or modifying export controls related to quantum computing and other cutting-edge technologies. This IRF resulted in new ECCNs regulating quantum and other emerging technologies, a new worldwide license requirement for specific technologies, new license exceptions, and new deemed export and reexport controls. As a leader in the development of quantum technology, UChicago is in a unique position to proactively develop a compliance program focused on emerging technologies and related regulations. To that end, UChicago's compliance team will work closely with quantum researchers and their department level administrators to assess the impact of this IFR on our research and compliance enterprises. This presentation will share the results of that partnership to demonstrate the impact of communicating regulatory updates to drive the development of compliance program best practices.

LEARNING OBJECTIVES

- High level summary of export control compliance programs in academia.
- Understand the scope of change implemented by the 9/6/24 IFR.
- Learn steps that can be taken to audit compliance programs that support emerging technology research programs.
- Share communication techniques and specific approaches that allow deeper understanding of research programs in a way that drives more nimble compliance programs.

Mike Vanderboom, Export Control Officer, The University of Chicago

RESEARCH INCENTIVES AND BRIDGE FUNDING

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

This session will explore mechanisms, primarily financial, that academic units can implement to help grow and sustain faculty research programs. When successful, these programs can help PIs weather gaps or temporary declines in sponsored research funding. The presenters (2 or 3?) from a cross section of institutions will introduce faculty incentive and bridge funding methodologies that they have employed. External sources of bridge funding will also be discussed. There is no one-size-fits-all solution to maintaining a robust research ecosystem so audience participation will be encouraged. Participants should come away from the session with a more sophisticated understanding of the strengths and limitations of various approaches to research finance at the department level.

LEARNING OBJECTIVES

- Gain familiarity with faculty incentive methodologies
- Gain familiarity with internal bridge funding methodologies
- Identify external bridge funding sources
- Identify strengths and limitations of various financial approaches

- Share success stories across institutions

Colleen Piersen, Associate Department Head for Administration, University of Illinois Chicago

Shaunte Baboumian, Research Administrator, Washington University in St. Louis

OUTPACE UNCERTAINTY WITH YOUR DATA AND ANALYTICS ECOSYSTEM

Track: Systems, Date, and Artificial Intelligence**Type**: Concurrent **Level**: Intermediate

When the sponsored research landscape shifts rapidly, sometimes overnight, how can your institution be prepared to respond with the data necessary to make informed decisions? This session explores how to create and maintain a responsive data infrastructure and how to leverage this foundation to produce reports and visualizations that drive engagement. We'll also discuss challenges that come with the quick, on-demand report ecosystem and how to build and preserve trust in the integrity of your data insights.

LEARNING OBJECTIVES:

- Identify the core components of a flexible data system that can adapt to evolving requirements
- Explore practical approaches to producing meaningful reports and visualizations that engage stakeholders
- Discover strategies for managing inevitable discrepancies while maintaining confidence in your data's integrity

Bryan Bachman, Sr. Assistant Director, Sponsored Programs Administration, University of Illinois Urbana-Champaign

BUILDING A BRIGHT FUTURE TOGETHER: THE ROLE OF COMMUNITY IN RESEARCH ADMINISTRATION

Track: Professional Development, Inclusion, and Engagement **Type**: Discussion **Level**: Overview

This interactive discussion will focus on how fostering a strong sense of community among research administrators supports professional growth, especially for new and emerging professionals. Participants will share their experiences on how their institutions build community through mentorship, networking, and collaboration. The conversation will explore the challenges and benefits of maintaining an engaged RA network and how community-driven initiatives can help junior staff thrive.

Julie Olivero; Research Administration Program Manager; University of Michigan
Bruxanne El-Kammash, Sponsored Development Manager, The University of Chicago

SESSION BLOCK #6 10:30 – 11:30 AM

PRIOR APPROVALS AND YOU! UNDERSTANDING FEDERAL PRIOR APPROVALS

Track: Post-Award/Financial **Type**: Concurrent **Level**: Intermediate

Want to master your understanding of prior approvals and know what to do when your PI needs to change something in their award? This session will go over processes for common prior approval requests. We will review what actions need prior approval, what questions to ask, and look at some examples.

LEARNING OBJECTIVES

- Understand what prior approvals are
- Be able to obtain all necessary materials and information
- Know how to submit requests to different agencies

Liz Grinstead, Post Award Research Specialist, The University of Chicago
Lauren D. Russell, Director, Accounting Services for Research and Sponsored Programs, Northwestern University

IMPLEMENTING A FINANCIAL SYSTEM: COLLABORATION IS KEY TO SUCCESS

Track: Organizational and Executive Leadership**Type**: Concurrent **Level**: Advanced

As a senior leader, launching a new system is one of the most significant projects you'll undertake, with far-reaching impacts on your organization. In a decentralized environment, effectively engaging key stakeholders and allocating the necessary resources for success can be challenging. In this session, we'll provide strategies for engaging stakeholders, cultivating change agents, managing expectations, and important considerations to keep in mind both before, during, and after implementation. While we will focus on a financial system implementation, the insights and techniques discussed can be applied to various systems across your organization. Join us to enhance your leadership toolkit and drive successful change.

LEARNING OBJECTIVES

- Participants will learn strategies for a successful system implementation that can foster long term partnerships between central offices and division offices/academic units.

Christi Keene, Senior Director, Research Finance, The University of Chicago
Katherine Pizer, Exec. Director of Research and Research Administration, The University of Chicago Biological Sciences Division
Sean Smith, Huron

SAVE YOURSELF FROM FRANKENSTEIN'S MONSTER: BUILD YOUR PROPOSAL DEVELOPMENT EXPERTISE

Track: Pre-Award/Research Development **Type**: Concurrent **Level**: Basic

Have you ever reviewed a faculty member's proposal and saw places for improvement, but didn't know where to begin? Or have you wanted to branch out into proposal development, and don't know where to start? You don't have to be a scientist OR a professional writer to help improve a proposal! This session will help you expand on your proposal development skills, and learn useful tips on how to communicate changes to faculty. You will learn:

1. The roles you can play in helping faculty improve their proposals
2. Basic proposal writing and editing strategies
3. How to identify and fix common problems
4. How to give meaningful and positive feedback to faculty on their drafts.

Hands on exercises will give you practice and help you gain confidence.

LEARNING OBJECTIVES

- Participants will learn how to build their proposal development expertise without being a subject matter expert.
- Participants will learn basic proposal editing principles and strategies.
- Participants will learn how to give meaningful and respectful feedback to PIs about their proposals.
- Participants will learn how to build their credibility with PIs

Lauren Gee, Research Administration Manager, University of Wisconsin-Madison

ENHANCING DEPARTMENT OPERATIONS THROUGH STRATEGIC TECHNOLOGY INTEGRATION

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

This session aims to foster a dynamic and collaborative dialogue on optimizing technology usage within departmental operations to enhance efficiency and streamline critical functions such as proposal intake, progress reports, resource sharing, and staff recognition. By leveraging platforms like Microsoft Teams, SharePoint, and Smartsheet, participants will explore innovative strategies to transform administrative workflows.

Presenters will share a case study from their department that illustrates the development of effective workflows tailored for research administration staff. Key topics will include:

- Proposal Intake and Approval Processes: Demonstrating how to implement structured forms, automated reminders, and robust workflow management to support proposal staffing and tracking.
- Progress Reporting Systems: Setting up automated alerts and reminders that enhance accountability and keep projects on track.

- Internal Resource Sharing Platforms: Best practices for developing internal websites that facilitate resource sharing and manage Principal Investigator (PI) files effectively.
- Staff Recognition Initiatives: Creating reminders and systems that empower department leadership to acknowledge and celebrate staff contributions regularly.

Attendees will be encouraged to participate in lively discussions, sharing their own experiences and strategies for harnessing technology to improve departmental operations. By the end of the session, participants will leave with actionable insights and a toolkit of ideas to implement within their own teams, driving efficiency and enhancing the collaborative spirit of their departments. Join us to learn, share, and innovate together!

LEARNING OBJECTIVES

- Explore Technology Solutions: Identify and evaluate platforms such as Microsoft Teams, SharePoint, and Smartsheet for optimizing departmental operations.
- Provide Actionable Takeaways: Equip participants with a toolkit of actionable insights and ideas that can be readily implemented to enhance efficiency and collaboration within their teams.
- Promote Innovation in Administrative Workflows: Inspire attendees to think creatively about how to leverage technology to transform and improve administrative processes within their departments.

Jonathan Okstad, Manager of Research Administration, Northwestern University
Levi Welch, Associate Research Administrator, Northwestern University

ADVENTURES IN LEVERAGING AI FOR CONTRACT NEGOTIATION AND AWARD SET-UP

Track: Systems, Date, and Artificial Intelligence**Type**: Concurrent **Level**: Overview

In this session, we will provide an overview of artificial intelligence capabilities in a contract lifecycle management tool, showing how it can assist negotiators in identifying problematic clauses and redlining agreements to incorporate your institution’s preferred language. We will also cover the challenges we faced during the implementation and launch, and how we overcame or mitigated them, as well as lessons learned.

LEARNING OBJECTIVES

- Gain an understanding of how artificial intelligence can assist negotiators in identifying problematic clauses and redlining contracts to comply with institutional requirements
- Gain an understanding of the challenges faced in its use and implementation
- Lessons learned from our implementation

Emily Baxter; Director, Contracts University of Michigan
Tonia Jackson, Associate Director, eRA systems, University of Michigan

THRIVING AT THE DESK: STRATEGIES FOR HEALTHY LIVING IN A SEDENTARY WORKPLACE

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent **Level**: Basic

In today's digital age, many of us find ourselves spending long hours seated at desks, leading to a sedentary lifestyle that poses significant health risks. Thriving at the Desk: Strategies for Healthy Living in a Sedentary Workplace, addresses these challenges head-on, providing practical solutions and insights to enhance your overall well-being while maintaining a desk job.

We will explore:

- The Sedentary Lifestyle Dilemma
- Physical Activity Integration
- Ergonomics and Workspace Design
- Nutrition and Hydration
- Mental Health and Stress Management
- Eye Health and Digital Wellness
- Workplace Policies and Culture

This presentation is designed for anyone looking to improve their health and well-being while managing the demands of a desk job. Whether you're an employee seeking personal strategies or an employer interested in promoting a healthier workplace, you'll leave with valuable insights and actionable steps to thrive at your desk.

LEARNING OBJECTIVES

- Integrate physical activity into their daily work routine
- Optimize their workspace for ergonomics and comfort
- Adopt healthy lifestyle changes to promote holistic health and well-being

Kari Woodrum; Pre-Award Grants & Contracts Associate; Western Illinois University
Beth Woods, Associate Director, Grants and Contracts, Center for Biomolecular Sciences, University of Illinois Chicago

COMPRESSION PLANNING FOR THE GRANT PROFESSIONAL

Track: PUI and ERI **Type**: Discussion **Level**: Basic

As a small college with a 1.5 FTE in the grants office, we utilize a planning process to assist with both pre and post award activities. This session will provide a case study of a small college grants office using McNellis Compression Planning process as a tool for efficiently and effectively managing grants either in person or virtually.

LEARNING OBJECTIVES

- Gain insights into streamlining processes:
- Participants will learn how to manage a decision-making process by bringing the correct people together and designing the meeting for optimal efficiency.

Jillain K Veil-Ehnert; Director of Foundation Relations & Research Grants; Concordia College, Moorhead, MN
Stacy Fitzsimmons, SNF Writing Solutions, LLC.

SESSION BLOCK #7 1:00 – 2:00 PM

HARNESSING AGENTIC AI: CHATGPT OPERATOR'S ROLE IN RESEARCH ADMINISTRATION

Track: Systems, Date, and Artificial Intelligence**Type**: Concurrent **Level**: Overview

Agentic AI is transforming workflows by enabling AI systems to perform complex tasks. ChatGPT Operator exemplifies this shift, offering research administrators a powerful tool to streamline processes, reduce manual workload, and enhance operational efficiency. This session will explore how Agentic AI can be leveraged in research administration, demonstrating practical use cases and best practices for implementation

LEARNING OBJECTIVES

- Understand Agentic AI – Learn what Agentic AI is and how it differs from traditional AI models.
- Explore Practical Applications – Discover how ChatGPT Operator can automate and optimize research administration tasks.
- Navigate Implementation Strategies – Identify challenges, best practices, and other considerations for integrating AI in research operations.
- Attendees will gain insights into the evolving AI landscape and practical strategies for leveraging ChatGPT Operator in research administration.

Brian Sabata, Assistant Director, Office of Sponsored Programs, University of Nebraska-Lincoln
L.D. Miller, Research Process Analyst, Office of Research and Innovation, University of Nebraska-Lincoln

BUILDING BLOCKS IN RESEARCH ADMINISTRATION

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

This session will provide the necessary framework that Research Administrators may use to manage sponsored projects at the Pre-Award stage of the sponsored project lifecycle. We will discuss essential concepts in building knowledge in research administration at Pre-Award, such as types of funding mechanisms, and the proposal development process. This discussion will also include solicitation or Notice of Funding Opportunity (NOFO) review, budget development, and institutional requirements.

LEARNING OBJECTIVES

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

Anna Jackson, Director, Pre-Award and Sponsored Development Services, The University of Chicago
Christy Schulz, Director, Research Administration, University of Wisconsin Madison

BUILDING RELATIONSHIPS WITH COMMUNITY BASED ORGANIZATIONS: VOLUNTEERING TIME TO BUILD RESEARCH IN OUR COMMUNITIES

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent **Level**: Advanced

Research administration is a dynamic field of skilled professionals who navigate the complex world of grants and contracts. It demands a wide range of skills, including organization, communication, attention to detail, and project management. Large academic and governmental institutions have teams of pre-award and post-award specialists, legal counsel, and administrators to guide principal investigators through the intricate grants process. This infrastructure is essential for managing the complexity of research administration and requires investment in salaries and professional development to sustain a capable workforce.

Smaller community-based organizations (CBOs), driven by their mission-focused goals, are well-suited to address community needs and could benefit from targeted grants. However, they often lack the staffing, experience, and knowledge to navigate the grant proposal process for significant funding from agencies like the NIH, CDC, or NSF. This lack of infrastructure can also hinder academic institutions from partnering with CBOs to conduct research and develop programs, ultimately limiting the impact on the populations they serve.

As research administrators and members of NCURA, we are committed to its mission and values of service, collegiality, and inclusiveness. Academic institutions have the expertise to assist CBOs in securing grant funding, and by volunteering their time, they can help maximize the benefits for local, state, and national communities.

LEARNING OBJECTIVES

- Learn about Community Based Organization Needs
- Faculty perspective: guest faculty presenter and their work with small community-based organizations
- Pilot project performed and outcomes and next steps
- How to build relationships with community-based organizations and find time to volunteer to support them

Jennifer Foley; Department Administrator; The Medical College of Wisconsin, Inc.
Jessica Olson, PhD; Associate Professor; The Medical College of Wisconsin, Inc.

INTELLECTUAL PROPERTY- CONTRACTING, LICENSING, AND PATENT CONSIDERATIONS

Track: Contracting **Type**: Concurrent **Level**: Intermediate

Understanding how IP contracting language can impact patent and licensing rights and obligations for background IP and foreground IP.

LEARNING OBJECTIVES

- Gain an understanding of contracting and tech transfer perspectives on treatment of intellectual property, acceptable language/positions, risks to Principal Investigators and the institution, etc.

Diana Ehrlich, Director, Research Contracts, The University of Chicago
Han Sun, Senior Manager, Business Development and Licensing, The University of Chicago

INDIRECT COSTS EXPOSED: HISTORY, MATH, AND NIH CUTS

Track: Post-Award/Financial **Type**: Concurrent **Level**: Intermediate

This session will address indirect costs: their history, how they're calculated, and methods of returning indirect cost reimbursement to units and PIs. All this will be discussed in the context of the NIH's recent announcement to cut indirect costs.

LEARNING OBJECTIVES

- Understand how indirect cost rates are calculated
- Understand different methods of indirect cost allocation
- Understand a method of how shared credit among multiple investigators is reported

Micah Carson, Central Post-Award Lead / University of Missouri – Columbia
Hansa Magee, director of research analytics, University of Missouri-Columbia

IMPACT OF CULTURE IN LEADERSHIP ROLES

Track: Organizational and Executive Leadership**Type**: Concurrent **Level**: Intermediate

The session will explore the influence of organizational culture on a research administration career, focusing on transitions between departmental and central administration roles, movement across institutions, and work in different U.S. regions. Participants will learn strategies for navigating, adapting to, and influencing culture, emphasizing self-awareness, trust-building, and insights from organizational behavior. We will also address topics such as remote work, managing remote teams, and leading virtual teams effectively. Finally, mentorship and servant leadership principles will be integrated throughout the discussion.

LEARNING OBJECTIVES:

- Learn to understand the impact of culture on an organization
- Skills on navigating and changing culture
- Share resources and tools for navigating remote work

Mario Medina, Senior Director, Sponsored Programs Administration, University of Kansas Medical Center
Sam Westcott, University of Wisconsin-Milwaukee

WORKING WITH INNOVATION HUBS AND INDUSTRY PARTNERS IN RESEARCH ADMINISTRATION

Track: Pre-Award/Research Development **Type**: Discussion **Level**: Intermediate

Innovation hubs are places where universities, industry partners, and entrepreneurs can collaborate, share ideas, and develop new solutions to complex problems. In 2023, the Impact Accelerator at the University of Cincinnati, a research development office, began a pilot partnership with the University of Cincinnati's 1819 Innovation Hub. In this session, members of the Impact Accelerator team will describe the successes and challenges experienced in the first year of the pilot and facilitate a discussion with other research administrators who already partner with, or are considering partnering with, their regional or institution's innovation hubs.

Kristin Gangwer, Research Associate, University of Cincinnati
Clair Green-Schwartz, Research Director, University of Cincinnati

SESSION BLOCK #8 3:30 – 4:30 PM

RELATIONSHIP BUILDING THROUGH FINANCIAL REPORTING

Track: Post-Award/Financial **Type**: Concurrent **Level**: Overview

In the complex world of academia, relationships between administrative staff and faculty are vital for the success of research projects and the smooth functioning of the institution. One of the most important areas where this relationship comes into play is in grant and financial reporting. Faculty members, often immersed in research and teaching, rely heavily on administrative staff to manage the financial aspects of their grants. Conversely, administrators depend on faculty to provide timely and accurate information required for compliance and reporting. Building strong, collaborative relationships in this area is essential for the successful administration of research grants and can greatly enhance the efficiency and effectiveness of both parties.

LEARNING OBJECTIVES

- Understanding the role of financial reporting in grant management
- Learn fundamentals of building trust between staff and faculty in the financial reporting process
- Employing the "rose, bud, thorn" concept to financial reporting and relationship building
- Co-creating relationship space between faculty and staff to better support financial reporting

Jennifer Foley, Department Administrator, The Medical College of Wisconsin
Crystal James, Sr. Business Manager / The Medical College of Wisconsin

BUILDING AN EFFECTIVE WORK CULTURE

Track: Organizational and Executive Leadership**Type**: Discussion **Level**: Intermediate

This discussion group complements the concurrent session on the impact of culture. We will start with an exercise to demonstrate techniques for building impactful connections within teams. Following the exercise, we'll engage in a discussion on navigating and enhancing organizational culture within research administration.

Mario Medina, Senior Director, Sponsored Programs Administration, University of Kansas Medical Center
Sam Westcott, University of Wisconsin-Milwaukee

THE STRUGGLE IS REAL: ADAPTING TO CHANGE WITHIN GROWING INSTITUTIONS

Track: PUI and ERI **Type**: Concurrent **Level**: Overview

We all experience moments of self-doubt in any profession, but with the ever-changing pace, constant challenges, diverse subject matter, and workloads that never seem to end in Research Administration, many of us find ourselves feeling helpless and intimidated by everything we must manage. These feelings are further magnified when adjusting to a new leadership role and/or a new institution. These growing pains can leave us feeling overwhelmed, incapable, and alone. When these feelings creep up on us, it's most important to reflect on why we are experiencing these feelings, what's causing them, and how we can work with them, not against them. Just like our own abilities and attributes, we must also extend this grace and patience to our institutions, learning to adapt by working with what we have. This session will focus on addressing these issues through trust, honesty, compassion, meaningful communication, creative approaches, and finding your community to lean on for guidance and support.

LEARNING OBJECTIVES

- View their own institutions through a new lens, recognizing potential and possibilities
- See their own abilities and attributes as real strengths to be used for professional growth
- Identify common struggles as opportunities for personal reflection and finding community with others having similar experiences

Lizette Gonzales; Research Liaison Officer; University of Texas Rio Grande Valley
Abby Guillory; Assistant Vice President for Research; University of Tulsa

SHARING EXPERIENCES IN NAVIGATING ANTI-DEI LAWS IN RESEARCH ADMINISTRATION

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent **Level**: Overview

The two-part session will start by providing an overview of those states in which Anti-DEI laws and policies in higher education are active or pending and what the laws and policies are. We will also discuss some of the challenges seen and will share some ways in which to navigate them, while maintaining a diverse and inclusive research environment. The second part of the session will a listening session, where participants share how they are navigating the DEI changes/challenges from the federal level and what DEI priorities participants would like to see.

LEARNING OBJECTIVES

- The different anti-DEI laws and policies affecting states across the region.
- How these anti-DEI laws and policies may be interacting and affecting research administration.
- Potential ideas and ways in which to navigate anti-DEI laws and policies in their own states.
- Ideas on navigating the DEI changes/challenges from the federal level.
- Learn what DEI priorities their fellow attendees would like to see.

Jenny Yuan; Finance and Grant Administration Manager; University of Wisconsin – Madison
Lauren Gee; Research Administration Manager; University of Wisconsin – Madison

THE TRIUMPHS AND PITFALLS OF COLLABORATING WITH INDUSTRY

Track: Contracting **Type**: Concurrent **Level**: Intermediate

This presentation will provide a general overview of the challenges and benefits of university-industry collaboration. Come prepared to discuss specific pain points, such as intellectual property, indemnification, key words to watch for, and more.

LEARNING OBJECTIVES

- Understand the potential benefits of working with industry
- Understand key challenges to expect
- Become familiar with problematic terms and language to look out for in research contracts with industry.

Jennifer Peck, Senior Industry Contracts Officer, The University of Chicago
Tamara C. Kuhn Martin, Assistant Dean for Research Administration, University of Wisconsin-Madison
Robert Gratzl, JD, Assistant Director of Contracts, University of Wisconsin-Madison

WHEN LIFE GIVES YOU AUDITS; NAVIGATING THE JOURNEY FOR SUCCESS

Track: Research Compliance and Ethics **Type**: Concurrent **Level**: Basic

You've received an audit notification, now what? In this session, we will present a beginner's guide on how to effectively thrive through an audit and incorporate best practices for smooth sailing for your financial compliance journey.

LEARNING OBJECTIVES

- Understanding difference of Single Audit versus an Award Specific/Site Visit
- Gain knowledge on understanding the audit scope and best practices
- Identify common areas of risk and developing a risk mitigation plan

Breanna Vasquez, Compliance Officer, The University of Chicago
Lynn Graves, Compliance Officer, The University of Chicago

NAVIGATING THE SHIFT: TRANSITIONING FROM INDUSTRY TO HIGHER EDUCATION

Track: Professional Development, Inclusion, and Engagement **Type**: Discussion **Level**: Overview

This interactive session will be led by two university professionals who have successfully made the transition from industry to higher education. Drawing from their personal experiences, the session will explore the unique challenges and opportunities that arise during this career shift, offering valuable insights for research administrators. Through candid discussions, attendees will learn how to adapt industry expertise to the higher education environment, gaining practical advice on how to thrive.

The session will share personal experiences and highlight the skills and perspectives that assisted these transitions. Attendees will engage in discussions about adapting industry expertise to the academic environment.

LEARNING OBJECTIVES

- "Understand the key challenges and opportunities faced when transitioning from industry to higher education.
- Learn about the skills and perspectives that ease the transition and how to apply industry knowledge in a higher education setting.
- Engage in interactive discussions about adapting to higher education culture and navigating the unique dynamics of research administration in this environment.
- Gain insights into how to leverage transferable skills for success in higher education.

Kristina Palmer; Data Analyst; University of Missouri – Columbia

WEDNESDAY

SESSION BLOCK # 9 9:00 – 10:00 AM

WORK SMARTER, NOT HARDER WITH COLLABORATIVE ONENOTE CHECKLISTS

Track: Post-Award/Financial **Type**: Concurrent **Level**: Overview

Do you work in a field where the processes and rules are complex and ever changing? Do you have to juggle multiple projects at the same time in a fast-paced and due-date driven environment? Are frequent interruptions a part of your daily routine? Then this is the session for you! Join us as we share how the URA team at the University of Chicago uses OneNote checklists to stay organized, up-to-date, and on the same page in managing processes and workloads.

LEARNING OBJECTIVES

- Learn how to use OneNote Checklists to help your team stay organized, current, and on track.

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

INTERNATIONAL OPPORTUNITIES THROUGH NCURA GLOBAL INITIATIVES

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent **Level**: Overview

The NCURA Select Committee on Global Affairs (SCGA) seeks to be the foremost provider of professional development, knowledge, and leadership in the global research administration and research management community. We serve all NCURA members—in the International Region and U.S. members who are involved in global research administration—by providing a global network of organizations and institutions for support and partnerships. We also offer professional development opportunities, such as our Global Fellowship and NICE Award, to build the requisite infrastructure for the global research enterprise. This session will discuss the current initiatives of the NCURA Select Committee on Global Affairs (SCGA) as well as provide an overview of existing international awards, including the NCURA Global Fellowship Program from a 2023 Global Fellow and the NICE Award.

LEARNING OBJECTIVES

- Participants will learn about NCURA Global's initiatives and available professional development opportunities.
- Participants will learn how to forge international research collaborations.

Anna Jackson, Director, Pre-Award and Sponsored Development Services, The University of Chicago

COLLABORATION AND COORDINATION: MANAGING T32 DEVELOPMENT THROUGH PRE- AND EARLY POST-AWARD PHASES

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

An overview of departmental management and coordination of T32 proposals during both the pre- and early post-award phases. This session will provide an introduction to the changes planned for the T32 tables with the release of FORMS-I. Presenters will also discuss issues commonly encountered during the pre- and post-award support of T32 proposals and awards and explore the collaborative solutions and resources that helped solve those challenges.

LEARNING OBJECTIVES

- Develop a working understanding of recent changes to T32 data tables
- Explore the various tools available for coordinating data collection and maintenance of T32 materials for pre- and post-award use
- Discuss the pre- and post-award struggles commonly associated with T32s
- Identify post-award stakeholders and explore how a collaborative team model may help mitigate challenges
- Learn about initiatives that support a community of learning and the sharing of best practices

Mellani Lubuag, Post Award Project Manager, University of Minnesota
Sarah Nelson, Grants and Contracts Professional 3, University of Minnesota

SUCCESSION AND CONTINGENCY PLANNING FOR SMOOTH TRANSITIONING – KEEPING THE TRAIN MOVING FORWARD!

Track: Organizational and Executive Leadership**Type**: Concurrent **Level**: Intermediate

Changes in personnel, at any level, do not need to be problematic for an organization. Sometimes changes occur with little warning and sometimes they are known farther in advance. When businesses anticipate changes, for example, due to ordinary turnover or retirements, careful pre-planning can lead to a more orderly transition. Planning is not the same for every position or for every business – it is not "one-size-fits-all". It is a business strategy that if well-conceived, will ensure that the organization continues to run smoothly and with minimal interruption when people move on. Succession planning and strategy are vital to the long-term success and stability of the organization. Failing to anticipate and plan for changes can lead to loss of continuity and productivity, unnecessary stress and friction within the organization or involved unit, and damaged relationships with clients.

LEARNING OBJECTIVES

- Discover benefits of successful succession planning at every level within the organization
- Understand importance of sharing institutional knowledge
- Discuss internal and external policies and procedures

- Share examples of resources including a sample checklist

Lynn Bagley, Research Administrator and VRAC Business Manager, Iowa State University, VRAC Research Center
Keith Kutz, Senior Award Administrator, Office of Sponsored Programs Administration, Iowa State University

UNIFORM GUIDANCE REVISIONS – THE SEQUEL AND UNDER NEW MANAGEMENT

Track: Federal/Sponsors/Agencies **Type**: Concurrent **Level**: Overview

On April 04, 2024, the Biden-Harris Administration announced the publication of the final revisions to the OMB's Uniform Guidance, 2 CFR. It proclaimed that that "these changes will allow agencies and recipients of Federal funds to focus more time and money on delivering meaningful results for the American people." The COFFA issued supplementary information to assist agencies with implementation on August 15, 2024 and corrections were published October 1st ,2024 and included in the final version effective October 1, 2024. See links below.

The “extreme makeover” of the Uniform Guidance results in revisions of 69 out of 191 sections (or 36 percent) from its 2020 edition. With the effective date of October 1, 2024, some of the revisions have become effective but most of the administrative and accounting revisions become effective on July 1, 2025 for most research institutions (the first fiscal year starting after October 1, 2024).

On January 20, 2025, a new Administration made its start in the Nation’s Capital and issued 26 Executive Orders (E.Os) to reshape the Nation landscape. The first E.O. rescinded many previous policies. We will explore any impacts of the E.O.s on the Uniform Guidance revisions and overall grant management.

This session will discuss the significant revisions to Title 2 (Office of Management and Budget Guidance for Federal Financial Assistance), impacts on research institutions, and how institutions are implementing. It will highlight any impact of the Executive Orders on the Uniform Guidance. Participants will have an opportunity to share and to ask questions of the presenters and other participants.

The Biden-Harris Administration Finalizes Guidance to Make Grants More Accessible and Transparent for Families, Communities, and Small Businesses | OMB | The White House - (https://www.whitehouse.gov/omb/briefing-room/2024/04/04/the-biden-harris-administration-finalizes-guidance-to-make-grants-more-accessible-and-transparent-for-families-communities-and-small-businesses/)

FY 2024 Revisions to 2 CFR: Federal Agency Implementation - https://www.cfo.gov/assets/files/FY-2024-Revisions-to-2-CFR-Supplementary-Information-for-Federal-Agency-Implementation.pdf

Guidance for Federal Financial Assistance; Corrections - https://www.federalregister.gov/documents/2024/10/01/2024-22520/guidance-for-federal-financial-assistance-corrections

Title 2 Grants and Agreements - https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200?toc=1

LEARNING OBJECTIVES

Participants will be familiar with:

- The major revisions by the six subparts and twelve Appendices of the 2 CFR 200 and when they are effective.
- How the revisions will impact the administration of research assistance agreements.
- Potential challenges, strategies and timelines for implementation.
- Impacts of the New Administration policies on the Uniform Guidance.

Gil Tran, CPA, Senior Specialist Leader, Attain Partners
Angelo Chrisomalis, Director, Post Award Management Office of the Vice Chancellor for Research, University of Illinois Chicago

A KINDLER, GENTLER (AND DATA-DRIVEN) APPROACH TO PROPOSAL SUBMISSION TIMELINESS

Track: Systems, Date, and Artificial Intelligence**Type**: Concurrent **Level**: Overview

In the ongoing search for the perfect combination of sticks and carrots to ensure proposals are submitted to the central office in a timely manner, the University of Illinois is trying to move the needle with a push from data. If "knowledge is power", we believe that transparent, widely available metrics are not optional when it comes to creating and supporting important policy decisions and improving outcomes. Find out if it's working--see the simple data visualizations and tools central to our approach, learn what it took to create them, and hear straight from the proposal team about the benefits and drawbacks of taking a softer, awareness-based path to cultural change.

LEARNING OBJECTIVES

- Understand the ""how"" and ""why"" of decisions related to design of our reporting metrics and submission tools
- Learn what considerations went into creation of the proposal submission policy and how it has affected the proposal submitters
- Identify benefits and drawbacks of focusing on awareness as the main driver of behavior change

Bryan Bachman, Sr. Assistant Director, Sponsored Programs Administration, University of Illinois Urbana-Champaign
Stephanie Fellmann, Associate Director, Sponsored Programs Administration, University of Illinois Urbana-Champaign

Katie Bateman, Assistant Director, Sponsored Programs Administration, University of Illinois Urbana-Champaign

START WHERE YOU ARE, USE WHAT YOU HAVE, DO WHAT YOU CAN

Track: PUI and ERI **Type**: Discussion **Level**: Overview

Research administration draws professionals from such a variety of backgrounds that RAs often only have one thing in common: they never planned to end up in the profession. This fact is particularly true at PUIs! Join us for an engaging discussion group session designed to empower research administrators by leveraging their current skills, education, and diverse backgrounds. This discussion-style presentation will support RAs working at PUIs by highlighting how existing experience can be translated into the qualities needed to excel in their roles. Participants will explore strategies and gain actionable insights to apply existing skill sets to research administration, thereby building confidence, addressing imposter syndrome, and creating a more inclusive and supportive professional environment. By focusing on these aspects, we can empower RAs to feel more confident and capable.

LEARNING OBJECTIVES

By the end of this session, participants will gain actionable insights into how to leverage their existing skill sets to excel in their role at a PUI, build confidence, and create a more inclusive and supportive environment for all research administrators.

- Leverage Current Skill Sets: Participants will identify and articulate how their existing skills, education, and diverse backgrounds can be effectively applied to the role of a research administrator at a PUI.
- Manage Imposter Syndrome: The session will provide tools and techniques to help participants manage and overcome imposter syndrome, fostering a positive and resilient professional mindset. Attendees will explore and practice strategies to boost self-confidence, recognizing and valuing their unique contributions to their roles.
- Foster Inclusivity and Support: Participants will learn how to create a more inclusive and supportive environment for all research administrators, enhancing collaboration and mutual support.
- Actionable Insights and Practical Steps: By the end of the session, participants will be empowered to successfully translate their skills into job performance, setting the stage for continued professional growth and success.

Laina Stuebner; Grants & Research Program Specialist; UW-Green Bay
Kari Woodrum; Pre-Award Specialist; Western Illinois University

SESSION BLOCK #10 10:30 -11:30 AM

IT'S FINE, EVERYTHING'S FINE....WORKLOAD ASSESSMENT FROM YOUR OWN PERSPECTIVE.

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent **Level**: Overview

Workload assessment has become a targeted metric in higher ed to determine performance and see what resources are needed to meet demands. We will discuss tips and tricks and use some online resources to better prepare ourselves to provide these data to those who may ask for it and also may help us better measure our own needs in our jobs.

LEARNING OBJECTIVES

- Understand workload assessment,
- work on measuring our own workload and
- better identifying what resources we may need to help ourselves.

Kelly Andringa; Research Manager; University of Iowa
Hang McLaughlin; Grants & Contracts Manager; University of Minnesota

A VIEW FROM WASHINGTON, DC: WHAT DOES THE FUTURE HOLD

Track: Federal/Sponsors/Agencies **Type**: Discussion **Level**: Overview

Join NCURA Magazine Senior Editor and authors of the NCURA Magazine article “A View from Washington, DC: What Does the Future Hold” for a one-hour discussion. The authors will discuss their article and invite questions and conversation.

Tanta Myles, Senior Editor, NCURA Magazine and Associate Vice President for Research Integrity Assurance, Georgia Tech

Deborah Altenburg, Vice President for Research Policy and Advocacy, Association of Public and Land-Grant Universities (APLU)

Meredith Asbury, Assistant Vice President for Government Relations and Public Policy, Association of American Universities (AAU)

LEVERAGING COI DATA TO COMPLY WITH EVER-CHANGING REGULATIONS

Track: Research Compliance and Ethics **Type**: Concurrent **Level**: Intermediate

Every University is required to collect conflict of interest (COI) data from faculty and some staff. The ever-changing regulations surrounding government funding are requiring more Export Control and

Research Security measures. My talk will focus on leveraging this data to aid in Export Control and Research Security purposes required by NSPM-33 and other regulations.

LEARNING OBJECTIVES

- Acquire knowledge of COI policies and data collection
- Acquire knowledge about the regulations surrounding Export Control and Research Security and the overlap with COI data
- Better understand how these separate compliance requirements can work together while remaining compliant with their own policies and regulations
- Better understand how compliance offices can exit data silos and harmonize their processes

Kailee Zingler, Compliance Officer, The University of Chicago

Jenny Meyer, Compliance Specialist, The University of Chicago

BUILDING COMPLEX PROPOSAL BUDGETS

Track: Pre-Award/Research Development **Type**: Concurrent **Level**: Intermediate

In this session, attendees will learn how to develop complex budgets for large research center projects with an emphasis on Department of Defense projects. Topics covered will include a presentation on how different costs can be supported through campus-wide policy development and resource planning tools. The presentation will include a deep dive by building a sponsor budget task-by-task and aligning that budget to schedule milestones and tasks.

LEARNING OBJECTIVES

- Effectively engage your sponsored programs office and other campus stakeholders to develop institutional policy around direct costs.
- Understand different ways to budget complex proposals and justify different types of allowable costs under University guidelines, eg provisional Service Centers, electronic systems, capital expenses, and administrative effort.
- Gain proficiency with factors that impact the budget, including by-task or milestone driven project budgets.

Kristin Michel, Sr. Pre-Award Program Manager & Interim Team Lead, University of Notre Dame

Patience Graybill, Senior Research Development Associate, Washington University St. Louis

Angela Wilcox, Senior Associate, Attain Partners

HOW UCHICAGO IS USING THE CARROT AND STICK APPROACH TO STREAMLINE CTA NEGOTIATIONS - A CASE STUDY

Track: Contracting **Type**: Concurrent **Level**: Intermediate

As part of its dedication to opening clinical trials faster, UChicago implemented a novel pilot program implementing a fee for the negotiation of CTAs, coupled with specific contracting options to have the fee waived. The intention of the program was to encourage sponsors and CROs to move toward contracts that required less time and effort to achieve mutually agreeable terms. This session will cover the background, implementation, and results to date of this program, as well as providing attendees with the tools to consider whether a similar initiative may be right for their institutions.

LEARNING OBJECTIVES:

- Why UChicago felt the need for this program.
- How the program was implemented.
- Achieving buy-in from key stakeholders.
- The role of the Accelerated Clinical Trial Agreement (ACTA) in the program.
- Challenges and lessons learned.
- Impact of the program on CTA turn-around times.
- Tools other institutions can use.

Erin Bullok, Associate Director for Clinical Trial Contracting, University Research Administration, The University of Chicago

Cassandra Bolding, JD, Senior Clinical Trial Officer, University Research Administration, The University of Chicago

Tyler Flores, JD, Senior Clinical Trial Officer, University Research Administration, The University of Chicago

SPOTLIGHT ON THE REGION IV MENTORING OUR OWN (MOO) PROGRAM

Track: Professional Development, Inclusion, and Engagement **Type**: Concurrent **Level**: Basic

The Mentoring Our Own (MOO) program is open to anyone in Region IV who would like to enhance their leadership skills within the realm of Research Administration (mentees), as well as those who wish to share their experience and leadership skills with others (mentors). The goal of the program is to provide mentees with the knowledge and confidence they need to implement change within their own system and to actively contribute to growth across the field of Research Administration. In this session, we'll provide an overview of the MOO program, offering a chance to ask questions and engage with previous participants.

LEARNING OBJECTIVES

- Engagement and Networking with MOO Alumni: You'll have the opportunity to engage directly with past participants, ask questions, and learn from their firsthand experiences in the program.

Crystal James; Sr. Finance and Grants Manager; Medical College of Wisconsin

MOO Mentees Presenting:
Rachel Crites, Pre-Award Program Manager, Notre Dame
Lindsey Omiecinski, Sponsored Development Specialist, The University of Chicago
Lou Mejorada, Pre-Award Award Program Manager, Notre Dame
Kristen Bilyea, Research Administrator Assistant, Michigan State University

HOW TO DEAL WITH DIFFICULT FACULTY

Track: Departmental **Type**: Discussion **Level**: Basic

Talking about best practices when dealing with "Dynamic" faculty

Carol Govern, Sr. Research Administrator, Northwestern University

THANK YOU, CONFERENCE COMMITTEE AND TRACK CHAIRS, FOR YOUR CONTRIBUTION TO THE MEETING!

Sandy Fowler

Conference Chair

University of Wisconsin Madison

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Workshop	**Michele Kennett**, University of Missouri, kennettmr@missouri.edu	
Breakfast Table	**Maura Cleffi**, Northwestern, m-cleffi@northwestern.edu	

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