RESEARCH ADMINISTRATION GOES GLOBAL

NCURA Region IV and Region VIII Spring Meeting
April 26-29, 2015
Chicago, Illinois
Welcome to Chicago!

This year is a first for NCURA: we are excited to host the first ever joint regional meeting with Region IV and Region VIII. This is the first regional meeting to truly "go global" and we are celebrating the event for five full days in Chicago. As the tulips bloom down Michigan Avenue, NCURA members from across the Midwest and the globe will descend on Chicago's gold coast, at the historic Drake Hotel. Old friends will reconnect and welcome new friends from near and far. We are honored to chair this meeting, and even more honored to work with a cast of talented colleagues who put together an amazing program, jam packed with educational workshops and sessions, and exceptional networking opportunities. Take a peek through the following pages and you will find:

- Our keynote speaker, Dr. Robert Murphy, Director of the Center for Global Health at Northwestern University, kicks off the meeting sharing stories about his experience over several decades developing international collaborations.
- New this year, we're following the keynote with Hot Topic Discussion Circles to stimulate thoughts and ideas and prepare us to attend a selection of 60 concurrent sessions over three days.
- This meeting is special, and we intend to celebrate Chicago style. Please join us for a Sunday evening reception at the Museum of Contemporary Art; Monday evening dinner groups to a wide selection ethnic restaurants and local breweries; and Tuesday evening's "Taste of Chicago" at the Drake featuring Dee Alexander, a local Chicago singer who has received international praise for her work.

Finally, we could not have put this program together without the help and support of an incredible team committed to make this meeting outstanding. We are reminded through these last few months how lucky we are to have the support of our NCURA colleagues. Thanks to everyone who has helped making this meeting a success!

Eva & Kirsten
Evisions develops innovative, easy-to-use software that simplifies work for higher education institutions and research organizations. Evisions is transforming the face of electronic Research Administration by producing intuitive, cloud delivered products, and executing quick implementations.

Evisions makes Research Administration easier by increasing office efficiency and rapidly responding to support needs.

The Evisions Research Suite includes, Cayuse 424, Cayuse SP and Cayuse IRB.

Please visit us at www.evisions.com/research
Follow Evisions on Twitter (@EvisionsInc)
and join the conversation on our Evisions blog@ blog.evisions.com.

Region IV and Region VIII thank Kirsten Yehl and Eva Björndal, Spring Meeting Co-Chairs, for all of their hard work to make this meeting a huge success!
## Sunday, April 26

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<th>Time</th>
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<td>Registration Desk Open &amp; Exhibits</td>
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<tr>
<td>8:30am – 4:45pm</td>
<td>All-Day Workshops</td>
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<td>10:00am – 11:45am</td>
<td>Get Involved! Fair</td>
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<td>12:00pm – 1:15pm</td>
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<tr>
<td>6:30pm – 9:00pm</td>
<td>Opening Reception: Museum of Contemporary Art</td>
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*Meet or reconnect with colleagues and share a toast to kick off the conference! An evening with colleagues shared in the galleries of the renowned Museum of Contemporary Art, just a few blocks from the Drake Hotel.*

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<th>Time</th>
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<td>9:00pm – Midnight</td>
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*Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.*
Sunday, April 26

7:30am – 5:00pm  Registration Desk Open and Exhibits
8:30am – 4:45pm  All-Day Workshops

WORKSHOP #1  8:30 – 4:45
Basics of Pre-Award Research Administration

This full-day, activity-rich workshop is intended to provide an introduction to what every pre-award research administrator should know. PowerPoint and “talking heads” will be kept to a minimum! Instead, you will spend the morning with your post-award colleagues engaged in exercises that address roles and responsibilities in research administration, the lifecycle of an award, budgeting and cost-sharing, allowable costs, and different award and sponsor types.

In the afternoon session, you will break out with your pre-award colleagues to participate in activities that bring to life the roles and responsibilities specific to pre-award research administrators. Topics will include finding funding, dissecting program announcements, assembling proposals and budgets, submitting proposals, and accepting awards.

Participants will learn:

• How their job fits into the wider research administration enterprise
• New strategies for assisting faculty with proposal development and submission
• Tips and tricks that increase the chances of proposal success
• Key concepts that protect the institution’s good standing and increase the likelihood of a smooth project implementation

Craig Reynolds, Associate Director, Office of Research & Sponsored Projects, University of Michigan
Heather Offhaus, Director, Grant Review and Analysis, University of Michigan Medical School

WORKSHOP #2  8:30 – 4:45
Basics of Post-Award Research Administration

This full-day, activity-rich workshop is intended to provide an introduction to what every post-award research administrator should know. PowerPoint and “talking heads” will be kept to a minimum! Instead, you will spend the morning with your pre-award colleagues engaged in exercises that address roles and responsibilities in research administration, the lifecycle of an award, budgeting and cost-sharing, allowable costs, and different award and sponsor types.

In the afternoon session, you will break out with your post-award colleagues to participate in activities that bring to life the roles and responsibilities specific to post-award research administrators. Topics will include award acceptance and management, allowability, effort reporting, cost transfers, subcontracts and closeouts.

Participants will learn:

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

James Bar Bret, Associate Vice President for Fiscal Operations and Controller, Wayne State University
Gail Ryan, Assistant Vice President, Sponsored Program Administration, Wayne State University
Sue Paulson, Assistant Controller, University of Minnesota
**Sunday, April 26**

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<td>Morning Workshops</td>
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**WORKSHOP #3  8:30 – 12:00**

**Basics of Research Administration**

This *morning only* workshop is intended to provide an introduction to what every research administrator needs to know as a baseline. PowerPoint and “talking heads” will be kept to a minimum! Instead, you will spend the morning with those participating in the full-day workshop and engage in exercises that address roles and responsibilities in research administration, the lifecycle of an award, budgeting and cost sharing, allowable costs, and different award and sponsor types.

Participants will have an overview of:

- How their role fits into the wider research administration enterprise;
- The major components of an award lifecycle;
- Common definitions and approaches to areas of research administration

*James Barbret*, Associate Vice President for Fiscal Operations and Controller, Wayne State University  
*Heather Offhaus*, Director, Grant Review & Analysis, University of Michigan Medical School  
*Sue Paulson*, Assistant Controller, University of Minnesota  
*Craig Reynolds*, Associate Director, Office of Research & Sponsored Projects, University of Michigan  
*Gail Ryan*, Assistant Vice President, Sponsored Program Administration, Wayne State University

**WORKSHOP #4  8:30 – 12:00**

**A (Very) Beginners’ Guide to Proposal Writing**

“Have you seen this grant opportunity? We should apply for it.” When you hear something like that, be advised it’s the “Royal We!” Actually you are going to write a proposal for external funding. Problem is, you’ve never done that before. Or maybe you’re working with a young faculty member who’s never written a proposal before and your mission is to help that person land a research grant. In any case, you’re looking at a steep learning curve.

Specially designed for PUI personnel, this workshop will take you through the process of writing a grant proposal, including all those things that have nothing (much) to do with actual writing, but can make your proposal stronger and more competitive. We’ll talk about (and have examples of) effective Need Statements, Research Questions, Logic Models, and Evaluation Plans. We’ll also talk about effective writing skills and key elements you should make sure find their way into your proposal.

Participants will learn:

- Pre-Writing issues that you must address before you start your proposal;  
- How to formulate an effective Research Question or Need Statement;  
- How to structure your research plan;  
- Charts, visuals, and how to pull them all together.

*Jeff Ritchie*, Director of Sponsored Programs, Lewis University  
*Michele Schoenecker*, Senior Proposal Development Manager, University of Wisconsin – Milwaukee
WORKSHOP #5  8:30 – 12:00
Clinical Trials: An Administrator’s Primer for Financial Management

This workshop will focus on managing the unique aspects of clinical trials, from a brief history and introduction, protocol evaluation to budget development, budget/agreement negotiation to billing for research procedures, and ultimately closeout. Attendees will be asked to participate in a discussion of each pre-award and post-award consideration to establish a better understanding of clinical trials in an academic research setting. Tools will be demonstrated and case studies used to illustrate the content.

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

Learning Objectives:
- Understand the regulatory basis of conducting clinical trials and the resources needed for their successful completion
- Learn how to determine which resources will be needed and their associated cost
- Learn how to manage the multifaceted issues that often arise during clinical trials
- Learn how to complete clinical trials and manage post-closeout obligation

Kelly Caroll, Research Scientist Navigator, Ann & Robert H. Lurie Children’s Hospital of Chicago
Kristine Martens, JD, Assistant Director, Office of Sponsored Programs Ann & Robert H. Lurie Children's Hospital of Chicago
Lisa Pitler, Assistant Vice Chancellor, The University of Illinois at Chicago

WORKSHOP #6  8:30 – 12:00
The Uniform Guidance: Checking in and Moving Forward

We have been living with the shadow of the Uniform Guidance looming over us for the last sixteen months. Now that we are four months past the effective date, let’s take the time to check in with one another. Come prepared to hear from the presenters about their journeys with the Uniform Guidance and be prepared to share your own experiences (positive and otherwise) with the Uniform Guidance. We will discuss aspects of the Uniform Guidance that continue to pose challenges and talk about strategies to resolve them. We will also incorporate the COGR Readiness Guide as a means to gauge the state of an institution’s implementation.

Learning Objectives
- Participants will share information and best practices about UG implementation at their institutions
- Participants will discuss challenges related to the Uniform Guidance and strategies to resolve them
- Participants will leave with concrete ideas about moving forward with their institutions’ Uniform Guidance implementation

Jennifer Rodis, Policy Analyst, University of Wisconsin-Madison
Nicole Pilman, Uniform Guidance Implementation Coordinator, University of Minnesota
Robert Andresen, Associate Director, Post-Award Services, University of Wisconsin-Madison

WORKSHOP #7  8:00 – 12:00
H2020-ERC-ECAS European Research Opportunities

H2020-ERC-ECAS - European Research Opportunities: What’s in it for you? Hands-on info for interested and involved RAs to getting started or reporting on a grant. We will provide you with all the tools you need to support US participation in the European Horizon 2020 programme, be it through collaborative projects or through individual fellowships.

In half a day, you will familiarize yourself with:
• the European funding mechanisms of relevance for transatlantic projects/movements/research (The three pillars, what’s available to US participants),
• the application processes and online electronic project management system of the European Commission (where to find info, how to apply, prerequisites, etc.).
• practical exercises you will gain hands-on experience with the information sources and web tools used from identification of a call all the way to managing a multi-annual and sometimes multi-partner project (how to manage the grant).

Learning Outcomes:
At the end of this workshop, you will know where to find the answer to questions such as …
• “I am the PI in charge of a H2020 proposal for a collaborative project and need to check that all of my partners have extended their LEAR mandates, what does it mean, what do I do?”
• “I have spent 6 months as postdoc at my US organization, can I apply for a MSCA fellowship?”
• “What is the DESCA model?”
• “I would like to do this project at a European university, what are my options for European funding?”
• “I received an e-mail saying I have been invited to participate in a H2020 proposal, what’s the next step?”
• “Am I eligible to apply for a grant from the European Research Council?”

Bruno Woeran, Special Advisor, EU Research Management and Innovation Networks, LUT
Ylva Linderson, Financial advisor international grants, Grants Office, Karolinska Institutet
Bart Janse, Legal Officer, Common legal support service, Directorate-General for Research and Innovation, European Commission, Brussels

Afternoon Workshops

WORKSHOP #8 1:15 – 4:45pm
Department Research Administration 101

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

Learning Objectives:
• Participants will gain an understanding of the role of the Departmental Research Administrator
• Participants will hear tips on how to manage sponsored projects at the departmental level
• Participants will gain an appreciation of how federal regulations and institutional policies impact their work

Nathan Youngblood, Research Administrator, Northwestern University
Diane Meyer, Pre-Award Project Manager, Iowa State University

WORKSHOP #9 1:15 – 4:45pm
Understanding NIH Calls and Proposal Formats for non-US Research Administrators

Applying for research funding from the National Institutes of Health (NIH) is challenging in itself. For research
administrators at foreign institutions, lacking familiarity with the US federal research funding system adds a significant extra layer of complexity. A Funding Opportunity Announcement (FOA) from the NIH is generally 20-30 printed pages, contains all the information needed to apply (or decide not to, which is at least as important), but presumes knowledge of a number of rules, guidelines and legislation that may not be familiar for a foreign research manager.

Understanding the FOA is thus a key to success in applying for US grants.

The application procedure to US federal funders is highly standardized, using a common format referred to as SF424. This workshop, which is intended for Research Administrators at foreign institutions, will provide hands-on training in 1) understanding the FOA’s from the NIH to decide whether or not to apply, and; 2) setting up the grant proposal in the standard format (SF-424).

Participants must bring a laptops or tablets. During the workshop, there will be hands-on examples through the NIH website.

Learning Objectives:

- To be able to read and understand a Call For Application (CFA) or Program Announcement (PA) from the NIH to decide whether or not to apply, and;
- To be able to set up the grant proposal in the standard format (SF-424).

Olaf Svenningsen, PhD, Head of Southern Denmark Research Support, University of Southern Denmark, Denmark

WORKSHOP #10  1:15 – 4:45pm
Preparing an F&A Proposal and Application of the Negotiated F&A Rates

This will be an introduction to the process of establishing a new F&A rate or submitting and renegotiating an existing rate. The workshop will cover rates for colleges and universities, and not-profit organizations. This workshop will cover identification of a cognizant agency, when to prepare a rate proposal, what to expect after you submit the proposal, and what your rights are. The workshop will focus on the process and provide basic knowledge of an F&A proposal. Once the rates are finalized, the application of the F&A rates will also be covered for proposal budget submission.

Participants will gain an understanding of:
- the F&A rate process;
- negotiation of F&A rates;
- how to apply the rates after the rates are finalized.

Jennifer Wei Mitchell, Director of Cost Studies and Effort Reporting, Northwestern University
Kelly Morrison, Associate Director of Office for Sponsored Research – Evanston, Northwestern University
Carrie Hurney, Senior Director, Huron Consulting Group

WORKSHOP #11  1:15 – 4:45pm
Effective Presentations  FREE! FREE! FREE!

As a research administrator and NCURA member, you may often be called upon to explain issues surrounding sponsored research and the administration of grants and contracts. Yet these skills may be different than those necessary to serve effectively as NCURA discussion leaders, panelists, or workshop faculty. Integrating adult learning theory and techniques into presentations can make the difference between attendees surfing the Web on their smart phones or being fully engaged. This workshop will discuss effective presentation styles and techniques and explore the complexities of team presentations, particularly those that involve colleagues from other institutions and even around the globe. We also will clarify the different types of NCURA presentations and their varying roles and duties.
Learning Objectives:
- Participants will learn presentation and training techniques tailored to adult learning.
- Participants will learn the various types of NCURA presentations and receive strategies for presenting in each venue.
- Participants will learn how to develop a presentation with multiple presenters and with colleagues from other institutions and around the globe.

Sue Kelch, Senior Financial Specialist, University of Michigan
Eva Björndal, Team Leader Post-Contract Office, Karolinska Institutet
Michelle Schoenecker, Senior Proposal Development Manager, University of Wisconsin-Milwaukee

6:30pm – 9:00pm  
**Opening Reception: Museum of Contemporary Art**  
Meet or reconnect with colleagues and share a toast to kick off the conference! An evening with colleagues shared in the galleries of the renowned Museum of Contemporary Art, just a few blocks from the Drake Hotel.  
Located at 220 East Chicago Avenue

9:00pm – 12:00 midnight  
**Hospitality Suite Open**  
Located in the Princess Diana Suite, the Hospitality Suite is open each night, offering a place to unwind and join colleagues.

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.
Monday, April 27

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

7:30am – 8:30am  Continental Breakfast

8:45am – 9:00am  Introduction and Opening Remarks

9:00am – 10:00am Keynote Speaker

10:00am – 10:30am Morning Break

10:30am – 11:15am Hot Topic Roundtables 1

11:30am – 12:15pm Hot Topic Roundtables 2

12:30pm – 2:00pm Awards and Recognition Lunch

2:15pm – 3:30pm Concurrent Sessions

3:30pm – 4:00pm Afternoon Break

4:00pm – 5:00pm Concurrent Session

5:30pm – 6:30pm Newcomers’ Reception
Everyone new to NCURA or new to the Regional Meeting is invited to join Region IV and Region VIII leadership in the Princess Diana Suite for refreshments and to learn more about the organization. From here we will help connect you with your Dinner Group.

6:30pm – 9:00pm Monday Night Dinner Out
Sign-up near the Registration Desk to join other NCURA attendees and experience the local fare Chicago has to offer, a wide selection ethnic restaurants and local breweries. Dinner Groups will meet in the lobby at 6:30pm for reservations at nearby restaurants.

9:00pm – Midnight Hospitality Suite
The Hospitality Suite is open each night, offering a place to unwind and join colleagues.

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.
Monday, April 27

7:30am – 5:00pm  Registration Desk Open and Exhibits
7:30am – 8:30am  Continental Breakfast
8:45am – 9.00 am  Opening remarks
9:00am – 10:00am  Keynote Speaker

Robert L. Murphy, MD
Director of the Center for Global Health at Northwestern University

Topic: Global Health

Dr. Robert L. Murphy is the Director of the Center for Global Health at Northwestern University where he holds his primary academic appointment as the John P. Phair Professor of Medicine. Dr. Murphy’s primary research and clinical interest is in viral infections. His research includes drug development of new antiretroviral drugs and vaccines for HIV and viral hepatitis and the scale-up of therapy for AIDS, tuberculosis and malaria in sub-Saharan Africa. Dr. Murphy is also Special Advisor to the President’s Emergency Plan for AIDS Relief (PEPFAR) program in Nigeria, sponsored by the Harvard School of Public Health, where he has overseen the set up of 42 clinics that currently treat over 75,000 patients with HIV/AiDS. He consults on NIH-supported antiretroviral education projects in Senegal and is Principal Investigator for Northwestern’s NIH/Fogarty International AIDS Training Grant based in Nigeria and Mali and the Northwestern Fogarty Frameworks grant. International activities and interests include assisting in the establishment of an AIDS Clinic in rural southern Kenya funded by the African Village Clinics Foundation of Chicago.

10:00am – 10:30am  Morning Break
10:30am – 11:15am  Hot Topic Roundtables 1

First set of hot topic roundtables. The goal of these discussion groups is to bring together colleagues across regions in an interactive, fun way, early during the meeting and at the same time, present an opportunity to discuss some of the most burning research administration questions with your colleagues. Each table will have one of the session chairs from the sessions available over the coming days as facilitator and focus on this hot topic question for 45 minutes. A list of hot topics will be available online and will be distributed at the beginning of the meeting.

11:30am – 12:15pm  Hot Topic Roundtables 2

Second set of hot topic roundtables. Another chance to join one more group on a topic which is of most interest or is least known. The goal of these discussion groups is to bring together colleagues across regions in an interactive, fun way, early during the meeting and at the same time, present an opportunity to discuss some of the most burning research administration questions with your colleagues. Each table will have one of the session chairs from the sessions available over the coming days as facilitator and focus on this hot topic question for 45 minutes. A list of hot topics will be available online and will be distributed at the beginning of the meeting.

12:30pm – 2:00pm  Lunch and Recognition Awards

Join us as we recognize our colleagues’ success and accomplishments!

Meeting address by Robert Andresen, President-Elect NCURA

NCURA REGION IV and REGION VIII CHICAGO SPRING MEETING APRIL 26-29, 2015
Concurrent Sessions

Submitting A Perfect Proposal: Avoiding Common Problems On Proposal Submission
Pre-Award Research Administration, Basic, Concurrent Session

This session will focus on the role of the Research Administrators in assisting PIs with the submission of proposals that meet all the agency and institutional requirements. During this session we will share our experiences to help us all be the best Research Administrators we can be. We will discuss our role as Research Administrators in assisting PIs in the submission of proposals, discuss common problem issues in proposal preparation, discuss effective communication strategies, review tools to help us be more proactive, and discuss the agency review process.

Learning Objectives:
In this session participants will be able to:
- Understand, interpret, and articulate proposal guidelines.
- Provide tools for avoiding common proposal problems.
- Identify the various elements of a proposal and describe their purpose and importance in the review process.
- Communicate positions effectively during proposal development process.
- Understand the grant review process and communicate it with PIs.

Rasha Abed, Associate Director of Sponsored Research, Office of Sponsored Undergraduate Research, Valparaiso University
Becky Hayes, Assistant Director, Kent State University

Effective Leadership: Implementing and Managing Change
Senior Level Research Administration, Advanced, Concurrent Session

John F. Kennedy once said “Change is the law of life. And those who look only to the past or present are certain to miss the future.” His philosophy on change holds true in the field of research administration as well. While the research administrative lifecycle of Submission Negotiation Award Closeout will remain, it is inevitable the way we manage this process will change. This session will focus on successfully managing change within the framework of office structure, workload assignments, and culture. We will examine the impacts of change on personnel, supporting offices, clients and we will share suggestions on how to best promote and execute change.

Learning Objectives:
- Understand when change is necessary to move an organization forward
- Understand the degree to which you can successfully manage, implement, and sustain change
- Understand the factors that influence change and that the cycle of change is constant

David Richardson, Associate Vice Chancellor for Research, University of Illinois, Urbana-Champaign
Amy Brooks, Assistant Director of Sponsored Programs, University of Illinois at Urbana-Champaign
Kim Groller, Training & Outreach Coordinator, Office of Sponsored Programs & Research Administration, University of Illinois at Urbana-Champaign

Mentoring Our Own (MOO) Program
Professional Development, Overview, Concurrent Session

The Region IV MOO program is going on its third year of creating matches made in heaven and, we invite you to come learn and share about the program. During this session we will provide an overview of the program, outline expectations for mentors and mentees, and hear from mentor/mentee pairings about their experience with the program. Whether you are
already an existing MOO participant, new to MOO, or looking to join MOO; we welcome you to come learn and share your ideas on making MOO work for you!

Learning Objectives:
- Provide an overview of the Region IV Mentoring Our Own (MOO) program
- Promote opportunities for additional mentors and mentees to get paired in MOO
- Rely expectations of mentors and mentees
- Foster opportunities for mentors and mentees to meet
- Hear from mentor/mentee pairing on their experience with MOO

Diane Hillebrand, Grants and Contracts Officer, University of North Dakota
Tricia Callahan, Director of Proposal Development, Miami University
Kasлина Love Mosley, PARC Manager Research Administration, Washington University

## Evaluation and the Logic Model: Tools for Success

*Primarily Undergraduate Institutions (PUI), Overview, Concurrent Session*

Applying for external funding is a very competitive process. Many externally funded research and service projects are requiring the use of logic models in applications. A strong evaluation component integrated within the logic model can be the glue that holds your application together, proves you’re accountable, and demonstrates your organizational capacity and commitment to results. While it may seem daunting, evaluation and the logic model are useful tools in organizing your proposal, and hopefully/eventually, your funded project. Ball State University’s Social Science Research Center has provided over 30 years of project/program evaluation, needs assessments, evaluation capacity building, and practical research support to university faculty and community agencies. This session will focus on strategies to produce an organized and competitive proposal through the use of logic models and a robust evaluation plan. Specifically, how the two can operationalize your program/project and keep you organized from proposal to a project closeout. This includes activities to choose the right logic model, develop meaningful time/task plans, and how this information directly feeds the evaluation plan. Participants will get resources that allow them to describe the logic model, identify several types of logic models, the basics of evaluation, and how these tools can position a proposal/project towards the greatest likelihood of success.

Learning Objectives:

Kelley Stedman, Research Operations Manager, SSRC—Ball State University
Josh Raines, Assistant Director, SSRC—Ball State University

## Core Facilities: Financial Operation of Recharge Centers

*Financial Management, Intermediate, Concurrent Session*

This session will focus on the financial administration of NIH funded core facilities, including the following principles: examples of NIH support, allowable costs, calculation of appropriate user fees, subsidy, internal vs. external revenue, and equipment depreciation.

Learning Objectives:
- Understanding costing issues and compliance implications for NIH-funded core facilities.

Seleetta Nichols, Manager Research Administration, Medical Social Sciences, Northwestern University
Jennifer Wei Mitchell, Director of Cost Studies and Effort Reporting, Northwestern University
Go-Go Gadget Facebook!: Using Social Media to Extend Your Office Outreach and Community
Discussion Group

A popular 1980s children’s cartoon character Inspector Gadget used mechanized gadgets to battle his nemesis (crime syndicate M.A.D.) and magnify his crime-fighting skills. Although the Inspector never seemed to properly master his gadgets, they extended his ability to interact with the world, giving him powers to achieve what he normally couldn’t do alone. In much the same way, social media tools have provided us a new way to amplify our voice and develop our participation into the digital social sphere. As sponsored research administrators, we can use social media to expand our communication and outreach with relevant audiences. We can use it to tap into communities and networks related to our institutional missions, and we can interact with our colleagues in new and limitless ways. However, many of us already have extensive outreach programs, and the vastness and sheer immediacy of social media technology can seem overwhelming. This discussion session will explore how social media can play a role in the mission and goals of the SRO. We will discuss tools, strategies and methods to incorporate social media in a way that can augment our existing outreach and remain manageable in a busy office. We will explore ways social media can help you re-think the way you interact with communities inside and outside your institution.

Session Learning Objectives:

- Learn about essential social media platforms and tools
- Understand potentialities of social media to transform outreach and communication
- Articulate key strategies for producing effective content
- Articulate best practices for managing a social media outreach program

Patience Graybill Condellone, Pre-Award Administrator, Southern Illinois University Edwardsville

Basics of Negotiating an Industry Sponsored Clinical Trial Agreement (CTA)
Medical, Basic, Concurrent Session

Clinical Trials are often funded by for-profit private sponsors such as pharmaceutical companies. Clinical Trials are conducted in order to evaluate the safety and efficacy of a drug or device with the goal of ultimately bringing a product to market. For-profit private sponsors and academic institution are motivated by different but equally important objectives. As a result, a portion of the negotiation process is understanding the differing principles behind the sponsor’s and institution’s policies. This session provides an overview of the key negotiation issues that often arise in an industry sponsored clinical trial agreement such as subject injury, indemnification and liability, confidentiality, ownership of data, intellectual property and inventions, and publication, and will provide suggestions on how to negotiate through those issues.

Learning Objectives:

- Understand the basic elements of an industry sponsored CTA
- Identify the problematic CTA clauses
- Learn how to comfortably negotiate terms in accordance with your institution’s policies

Patti Pfiste, Sponsored Projects Specialist, University of Illinois at Chicago
Brenda Barrie, Associate Director of Sponsored Projects, University of Illinois at Chicago

Reducing Investigators Administrative Workload – Responsible Conduct in Research Administration
Professional development, Overview, Discussion Group

The concept of Responsible Conduct of Research (RCR) has direct and profound influence on the quality of research results: irresponsible conduct may have severe negative effects for everybody involved. A plethora of RCR codes of conduct, declarations, reports, and training programs for scientists exist all over the world. All of them either state explicitly, or imply, that research administrators and their organizations have a key role in RCR, but no code specifically for Responsible
Conduct in Research *Administration* (RCRA) seem to exist. A joint 2014 National Science Foundation–National Science Board report (link below) outlined measures to reduce administrative burden in federally funded research; how do these recommendations relate to the concept of RCRA? What are the implications for us as research managers and administrators?


Olaf Svenningsen, PhD, Head of Southern Denmark Research Support, University of Southern Denmark, Denmark

### Pitfalls and Challenges of International Campus Affiliations: Senior, Advanced, Concurrent Session

Is your university spreading its wings and increasing its international presence? This session will discuss some of the challenges of setting up, operating, and working with university affiliates in international settings. Northwestern University, with a campus in Qatar, will present some of their most challenging issues and discuss what has worked to help solve issues related to culture, taxes, IRB, personnel/employment, export control and reconciling NU-Evanston research practices with their primary funding agency’s practices regarding signature authority, effort reporting, and more. The University of Chicago has recently established a Trust in India to add to its broad international affiliations. Come get an idea of issues to overcome...some expected and others not so obvious...when your university moves into the international scene.

Learning Objectives:
- Hear about the daily challenges of managing research in Qatar
- Learn about special considerations for hiring staff in international settings
- Be introduced to the specific challenges of establishing the correct legal framework to allow U.S. funds to enter a foreign country
- Consider a host of other unique challenges specifically related to an international setting

Joanne Altieri, University of Chicago
Elizabeth Lance, Northwestern University in Qatar

### Be a show off! Promoting research results to leverage additional funding

Governmental, Basic, Spark Session

An overview of one institution’s print and social media campaigns designed to showcase PIs and their research results in order to leverage future funding.

Sarah Elvey, Grants Coordinator, The Ohio State University
3:30pm – 4:00pm  Afternoon Break

4:00pm – 5:00pm  Concurrent Sessions

Driving Change Management at Your Institution: A Panel Discussion
*Professional Development, Advanced, Concurrent Session*

In recent years, some of the most frequently used phrases in organizations include – “organizational transformation,” “data-driven decision making” and “operational efficiencies.” With most higher education and nonprofit institutions experiencing an incredible amount of change and constant pressure to perform more with less (as quickly as you possibly can), it can be easy to lose sight of the most important aspect of the transformation process – meaningful change management. In this session, we will engage in a facilitated discussion with research administration transformation experts around the topic of change management. Areas of focus will include how to create a culture of change excitement, how to engage key stakeholders in meaningful ways, how to address staff fears and anxieties, and how to ensure lasting and meaningful change at your organization. Whether you are tackling one process, one office or an entire organization, the basic principles of change management are critical to your success.

Learning Outcomes:
By the end of this session, participants will be able to:
- Understand the difference in change management strategies for changes imposed by external forces versus self-initiated change
- Understand how a good change management strategy can help any initiative make lasting impact at an organization

**Jenna Lee**, Director, Huron Consulting Group  
**Tracey Robertson**, Director, Huron Consulting Group  
**Eskedar Yirga Alem**, Manager Financial Operations, Institute for Public Health and Medicine Northwestern University

Partnerships to Propel Research: The Karolinska Institutet and Mayo Clinic Strategy
*Medical and Compliance, Intermediate, Concurrent Session*

The Karolinska Institutet and Mayo Clinic have collaborated scientifically for over 25 years. Recently their grants offices formed an administrative collaboration. The basis of this collaboration is on pre- and post-award processes for US and EU funding, but also extends into other areas of research support such as locating funding sources. This session will discuss how the administrative collaboration came about, developing the platform and processes and key outcomes.

**Laura Plant**, US Funding Specialist, Karolinska Institutet Sweden  
**Janice Grace**, Mayo Clinic, Rochester  
**Ylva Linderson**, Financial Advisor International Grants, Karolinska Institutet, Sweden

Let’s Negotiate!
*Pre-Award, Intermediate, Concurrent Session*

What might be the best way to conduct the work, if not a direct grant? When you get the contract(s), what should you watch out for and how can you help mediate the terms to make it acceptable to your institution? This session will explore both strategies and tips on how to work with potential sponsors to help shuttle the funding along and not get stuck, and
also will cover negotiation tips for when you get the contract. We will also discuss ways you can better work with your sponsors, especially if you're in a department, in between the sponsor and your central office(s).

Learning Objectives:
- To learn both basic and more advanced contract negotiation skills
- To learn strategies for working with difficult sponsors

**Aaron Crandall**, Department Research Manager, University of Wisconsin-Madison  
**Robert Gratzi**, Contracts Manager, University of Wisconsin-Madison

### International Projects: Two Approaches to Administering International Projects at PUIs  
**PUI, Basic, Concurrent Session**

Join research administration professionals from Indiana State and Ball State Universities to learn about different approaches to administering (pre and post-award) international sponsored projects. ISU (Dawn Underwood) will discuss opportunities and challenges from the perspective of smaller sponsored programs offices. BSU (Justin Miller, Kelly Peckham, and Courtney Franklin) will introduce how their SPO works in coordination with a specialized campus unit (Center for International Development) to find funding opportunities, develop proposals, and manage post-award considerations on international projects.

**Courtney Franklin**, Proposal Development Manager, Center for International Development, Ball State University  
**Justin Miller**, Sponsored Projects Administration, Ball State University  
**Kelly Peckham**, Budget Administrator, Center for International Development, Ball State University  
**Dawn Underwood**, Associate Dean, Office of Sponsored Programs, Indiana State University

### Direct or Indirect? A Practical Application of Costing Principles under the Uniform Guidance  
**Financial Management, Beginner, Concurrent Session**

Navigating the waters of cost principles can be a bit tricky. How do you define direct and indirect costs at your institution? What are the factors that determine allowability and allocability of costs? We will dive right into the costing principles and discuss real-life scenarios that research administrators face on a daily basis. If you are new to research administration this course will be a lifesaver!

Learning Outcomes:
- An understanding of the cost principles under the Uniform Guidance.
- Attendees will be provided a tool kit for practical application and interpretation of these principles.

**Carrie Hurney**, Senior Director, Huron Consulting Group

### Federal Sponsor Insight for Junior Faculty  
**Federal/Government, Overview, Concurrent Session, Intermediate**

In this session we will review the Ohio State University, College of Food, Agriculture and Environment Science, DC Days travel program for non-tenured professors to meet with federal agency program officers in Washington, DC and other locations. The goal of the program is to maximize faculty understanding of federal agency programs and to learn details of federal funding opportunities. We will discuss the development of this program, the application process, and the final implementation and site visits.

Learning Objectives:
- Participants will have an understanding of the logistics required to arrange this type of program.
International Region: Opportunities That Can Put You in the Spotlight and Enhance Your Career
Professional Development, Overview, Concurrent Session

How can chairing or serving on a volunteer committee move you up on the career ladder? Join this discussion group to learn about volunteerism and how your US colleagues use opportunities in their professional society to highlight their leadership ability, expand their professional network, and grow their reputation as a subject matter expert. Learn the best ways in which to make your institution aware of your acknowledged expertise and how your connections with colleagues from around the world can help them grow their own reputation.

Sue Kelch, University of Michigan
Eva Björndal, Team Leader Post-Contract Office, Karolinska Institutet, Stockholm
Dr Bryony Wakefield, Director, Research Development, Faculty of Medicine, Dentistry and Health Sciences, The University of Melbourne
Kathleen Larmett, Executive Director, NCURA
Bob Andersen, Associate Director, Post-Award Services, University of Wisconsin-Madison
Heather Offhaus, Director of Grant Review & Analysis, University of Michigan Medical School

Management Communications
Senior, Intermediate, Senior Audiences, Concurrent Session

We know good communications when we see them; likewise for poor communications. Add the element of international communications and different organizational cultures. We must achieve a fundamental understanding between both parties, or there can be a disastrous result. In this session, we will discuss how organizational culture can affect communication patterns. What are the unwritten rules of engagement, how it’s said and when to say it. More importantly, how and when must it be memorialized in writing. Small group activities will help to identify what helps (or hinders) effective management communications.

Learning Objectives:
- Attendees will learn about the principles of effective communication and how they apply in sponsored research
- Attendees will identify measures that can strengthen communications, and avoid those that do not

Anders Wennström, Grants Office Director, Umea University, Sweden
David Lynch, Executive Director, Office for Sponsored Research, Northwestern University

Financial Conflict of Interest – Policy Implementation from the Foreign Entity’s Perspective
International, Basic, Discussion Group

Financial conflict of interest - policy implementation from the foreign entity's perspective.
Are you a foreign entity? Have you ever had any challenges to tackle with US regulations like a FCOI policy? Or are you an US entity with a foreign subaward? Do they follow their own FCOI policy or are they following your policy? Do you know what resources could be helpful to foreign entities while developing their FCOI policy? Join the discussion group and share your experience or needs.

Learning objectives:
- To discuss about the financial conflict of interest policy development in the foreign entity and learn some useful resources.

Tiina Berg, Senior Research Funding Advisor, Research Funding Services, University of Helsinki, Finland
Service on Demand: Research Management and the Process Snake

Pre-Award, Basic, Spark Session

In this Spark Session the research management process Snake will be presented. Developed in a joint effort by all affiliated parties of the Admin group within Lappeenranta University of Technology (LUT), the Snake represents the entire process management way from cradle to grave in a transparent and easy to understand online way.

Bruo Woeran, Senior Advisor, Lappeenranta University of Technology, Finland

5:30pm – 6:30pm Newcomers’ Reception
Everyone new to NCURA or new to the Regional Meeting is invited to join Region IV and Region VIII leadership in the Princess Diana Suite for refreshments and to learn more about the organization. From here we will help connect you with your Dinner Group.

6:30pm – 9:00pm Monday Night Dinner Out
Sign-up near the Registration Desk to join other NCURA attendees and experience the local fare Chicago has to offer, a wide selection ethnic restaurants and local breweries. Dinner Groups will meet in the lobby at 6:30pm for reservations at nearby restaurants.

9:00pm – Midnight Hospitality Suite
The Hospitality Suite is open each night, offering a place to unwind and join colleagues.
Tuesday, April 28

7:30am – 5:00pm    Registration Desk Open & Exhibits
7:30am – 8:30am    Continental Breakfast
7:30am – 8:30am    Get Involved! Fair
8:30am – 10:00am   Concurrent Sessions
9:00am – 10:30am   Get Involved! Fair
10:00am – 10:30am  Morning Break
10:30am – 12:00pm  Concurrent Sessions
12:00pm – 1:30pm   Lunch with Business Meeting
1:30pm – 2:15pm    Concurrent Sessions
2:15pm – 2:30pm    Afternoon Break
2:30pm – 4:00pm    Get Involved! Fair
2:30pm – 3:30pm    Concurrent Sessions
3:30pm – 4:00pm    Afternoon Break
4:00pm – 5:00pm    Concurrent Sessions
6:00pm – 10:00pm   Tuesday Night Event

Join us for a Taste of Chicago in the Gold Coast ballroom, featuring an array of Chicago culinary delights. We are honored to have local Chicago celebrity, Dee Alexander, perform her jazz and blues favorites. Ms. Alexander has received international praise for her work and most recently performed at the Kennedy Center and Symphony Hall. She is well acquainted with NCURA, and promises to help us celebrate!

9:00pm – Midnight   Hospitality Suite

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

Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.
Tuesday, April 28

7:30am – 5:00pm  Registration Desk Open and Exhibits
7:30am – 8.30am  Continental Breakfast
8:30am – 10:00am  Tuesday Concurrent Sessions

Overview of the NIH
_Federal, Overview, Concurrent Session_

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

Learning Objectives:

- Provide brief history and organization of NIH
- Show how the grant process works for NIH extramural applications
- Explore the agency numbering system, vocabulary, specific forms, and NOA
- Outline the resources and sponsor systems

**Charlie Giese, Senior University Grants & Contracts Specialist, University of Wisconsin-Madison**  
**Kurt McMillen, Managing Officer, Research and Sponsored Programs, University of Wisconsin-Madison**

Beyond the Desktop: Integrating Today’s Electronic Tools Into the Workplace
_Concurrent Session_

There are incredible tools that can help you work smarter, improve your productivity, collaborate better, and work portably; and some of them are probably sitting unused on your computer right now. This session will explore new technologies that can improve collaboration and data sharing within your office, or just help improve your own personal workflow. We’ll also decode some tech-world jargon like "Workflow" and discuss why it's important to you. Finally, we'll discuss social networks and how to harness them to serve internal and external clients as well as improving the visibility of Research Administration to the general public.

Learning Objectives:

- Discuss Cloud Services and their impact on portability of data and paperless workflow
- Introduce Digital Notebooks and Collaborative software
- Employ the power of Social Media for good to triumph over evil
- Answer your burning technology questions

**Justin Morgan, Award Negotiator, University of Illinois, Urbana-Champaign**
Stories from the Trenches or You Think That’s Bad Well Listen to This!
Professional Development, Overview, Discussion Group

We've all got stories of situations you just can't believe really happened. This discussion group will be a forum for sharing your frustrating situations in an environment with colleagues that actually understand. Sometimes there might be lessons from which we can learn. Other times you may not learn anything. So there is a chance you may not learn much of anything but it sure will feel good to know you are not alone.

Jim Maus, Senior Research Administrator, Division of Infectious Diseases, Department of Internal Medicine, Washington University School of Medicine

Impacts of Uniform Guidance and Global Collaboration on Sub-recipient Monitoring
Federal/Government/Financial, Overview, Concurrent Session

This session will cover two current issues that can present challenges for research administrators: complying with OMB Uniform Guidance regulations and monitoring international sub recipients. We will go over the changes to sub recipient monitoring required by the new regulations and share strategies for staying in compliance. We will also talk about common challenges research administrators face when monitoring international sub recipients, especially those unfamiliar with US Federal requirements, and present some techniques for overcoming those challenges.

Learning Objectives:
- Review the Uniform Guidance requirements for subcontracts and learn strategies for being compliant
- Identify the challenges of sub recipient monitoring for global collaborations and learn techniques for overcoming those challenges

Melody Delfosse, Information Manager, Accounting Services for Research and Sponsored Programs, Northwestern University
Tyra Darville-Layne, Senior Subcontracts Manager, Office for Sponsored Research, Northwestern University

Who Is the IRB and What Do They Want From Me?
Primarily Undergraduate Institutions (PUI), Overview, Concurrent Session

The Institutional Review Board (IRB) for the protection of human subjects can strike fear into the hearts of novice researchers. This introductory presentation will explain the IRB, its scope and jurisdiction, and what the IRB generally expects from investigators. Topics will include a historical perspective, an overview of the federal regulations, and possible changes on the horizon. A few case studies will be presented from the social/behavioral science and education research (SBER) arena. This session will provide research administrators with the ability to counsel investigators on IRB policy and practices to facilitate a trouble-free submission.

Learning Objectives:
- Identify the historical milestones leading to the formation and revision of federal regulations for the protection of human subjects in research.
- Understand today’s ethics climate
- Apply the regulations to a typical minimal-risk SBER project

Catherine Anson, Director of Sponsored Programs, John Carroll University
Overview of Clinical Trials  
*Medical/Department Research Administration, Basic, Concurrent Session*

Introducing the basics of clinical trials from definition to contract negotiation. We will cover everything from human subject protections to significant contract terms. We will discuss definitions of trials and phases, regulatory impacts and protections of subjects that have to be considered, and how to work with the sponsor in order to be successful.

Learning Objectives:
- Demonstrate working knowledge of different phases of a clinical trial
- Identify key compliance issues related to a trial
- Describe key financial considerations and potential approaches to handling

*Patrick Medina*, Director, *Grants and Contracts Services; Associate Director, Research and Sponsored Programs, University of Wisconsin-Madison*  
*Robert Gratzl*, Managing Officer, *Contracts Team, Research and Sponsored Programs, University of Wisconsin-Madison*

Space Survey from the Department’s Perspective  
*Department Pre-Award, Overview, Concurrent Session*

This session will focus on why the space survey is important to your department and institution. It will provide an overview of the crucial role that department administrators play in the space survey process. The session will also provide tips and tools to help improve the accuracy and efficiency of the space survey.

Learning Objectives:
- What is a space survey
- Why is a space survey important
- Other uses for the space survey
- Tips and tools for department administrators

*Deborah Cundiff*, Business Administrator, Northwestern University  
*Kevin Grzyb*, Space Information Manager, Northwestern University

Managing Contracts and Service Agreements in Multi-Center Trials  
*Financial, Intermediate, Concurrent Session*

Contracting services and activities is a major milestone in the start-up and conduct of multi-center trials and is fraught with delays and challenges. In this session leaders/panelists will explore the differences in various services within clinical trials and discuss strategies for engaging sites, creating, initiating and maintaining trial agreements.

Learning Objectives:

*Valerie Stevenson*, Administrative Director Neurological Emergencies Treatment Trials, University of Michigan, Health Systems  
*Elizabeth L. Brant*, Research Administrator, School of Dentistry, University of Michigan
Accentuating the Positive: Customer Service in the Age of increased Compliance Oversight

*Professional Development, Overview, Discussion Group, All Audiences*

In the immortal words of Arlen and Mercer: “You’ve got to Accentuate the positive, Eliminate the negative, And latch on to the affirmative ...” everyone knows we have to stay in compliance. And everyone knows that we have to provide excellent customer service. What if you are asked to make a purchase that will push you so far out of compliance that you can hear the auditors laughing diabolically? So, are compliance and customer service mutually exclusive? Not in our world. The service we provide to our customers is to help them do their research and that means to stay in compliance. And that is a positive and empowering thought.

Learning Objectives:

- Discussion of good customer service as related to research administration and creating a more positive approach to approach their work.

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


*Pre-Award, Basic, Spark Session*

The session will provide an overview of the basic fundamentals needed to assist novice faculty members in developing proposals geared toward externally-funded projects. We will discuss the barriers that hinder faculty from getting involved in sponsored programs and dismantle a few by: 1) demystifying the idea that: “they can’t write a grant because they don’t know how or have never written before” – providing guidance regarding University protocols, budget development and submission 2) discussing how to establish a team-oriented relationship between research administration staff and the faculty – a clear definition of each parties roles and responsibilities, review of guidelines, establishing timelines and providing guidance regarding policies; 3) motivating faculty through each step of the proposal process through submission – soliciting confidence in their expertise.

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

10:00am – 10:30am  **Morning Break**

10:30am – 12:00pm  **Concurrent Sessions**

Effort Reporting and Uniform Guidance

*Financial Compliance, Overview, Concurrent Session*

This session will provide a closer review of the new regulation, Subpart 200.430 that governs the compensation for personal services. Effort Reporting is not the required approach to fulfill this regulation. However, many universities have chosen to continue to utilize the existing practice with or without modification. We will compare the key topics and differences between Subpart 200.430 and A-21, Section J.10. New or highlighted terms such as Institutional Base Salary, Internal Controls, and “written” policies or definitions will be discussed

Learning Objectives:

- Participants will acquire a further understanding of the Uniform Guidance, Subpart 200.430, new regulation pertaining to the Effort Reporting practice;
Participants will be able to understand the differences between Subpart 200.430 and A-21, Section J.10

Jennifer Wei Mitchell, Director of Cost Studies, Northwestern University
Erin Farlow, Senior Effort Coordinator, Northwestern University
Robert Andresen, Director of Research Financial Services & Associate Director, Research and Sponsored Programs, University of Wisconsin-Madison

Data Management and the DMP Planning Tool (Data Management Planning Tool)
Pre-Award, Overview, Concurrent Session, Basic

Explore the University of California Curation Center’s free, online DMP (Data Management Planning) tool and get your investigators thinking about their data: how it is stored, who manages it, and who has access to it. Participants will receive a hands-on demonstration of the DMP tool and work through a data management template to use at their own institutions.

Learning Objectives:
- Articulate the importance of having a sound data management plan to their faculty and staff.
- Introduction to the Data Management Tool and will be given a demonstration on how to use the tool.
- Produce a data management plan using the online data management tool.

Tricia Callahan, Director of Proposal Development, Miami University

Do Shared Service Centers Really Work for Higher Education Institutions: The Nuts and Bolts of Successful Shared Service Center Implementations
Senior Management, Advanced, Concurrent Session

As institutional budgets have tightened, Universities are increasingly looking toward a shared service model to help reduce costs and/or improve service and compliance. To succeed in a university setting, shared service center implementations must take into account the unique environment of higher education, including elements such as shared governance and multiple funding streams. Implementation and planning should be approached as a collaborative process, integrating input from Principal Investigators (PIs), faculty, and staff to develop an approach to providing services that fit within the context of university culture. This workshop focuses on elements of successful shared service implementations, with a particular focus in research administration shared service centers and the unique aspects of centralizing local research support. We will outline initial steps to gaining buy-in from the campus community, how to involve critical stakeholders in a meaningful way and tangible steps to implementing shared service centers at an institution.

Jenna Lee, Huron Consulting Group
Megan Cluver, Manager, Huron Consulting Group

Get What You Want Out of an Award Negotiation Without Turning it into a Battle
Concurrent Session

L(A.K.A. “Aren’t We a Little Too Old for Temper Tantrums?” or “How to Avoid Spending All of Your Negotiation Time in a “Time Out?”)
Every Sponsor and Sponsored Program’s Office want the same thing out of a negotiation: to get what they want but also walk away with their relationship intact. No one wants to be a pushover, yet no one wants to push too hard and be seen as unyielding. Though it’s certainly a challenge, with some planning and strategizing it’s possible to strike a balance. It is possible for each side to feel as through we have negotiated a win/win agreement. This session will focus on looking at a number negotiating tactics, aimed at providing you with tools and a game plan leading to the path of many successful negotiations.

Learning objectives: Understanding/appreciating the importance of:
Establishing objectives;
Identifying a range of outcomes; and
Using interpersonal skills to positively influence your negotiations

Amy V Brooks, Assistant Director of Sponsored Programs, University of Illinois, Urbana-Champaign

Project Close-out: How to Navigate the Rough Seas
Financial, Beginner, Concurrent Session

Lead by a group of 3 seasoned research administrators from the University of Michigan, best practices pertaining to project closeouts will be discussed. In this discussion panel participants will be encouraged to share their experiences with the group for a lively discussion on all things project close out related. Best practices will be discussed that will give participants the tools necessary to effectively manage all project closeouts.

Learning Objectives:

Amy Harms, University of Michigan
Melissa Karby, University of Michigan
Valerie Stevenson, University of Michigan

Developing and Managing an Education and Training Program for Research Administration
Professional Development, Intermediate, Concurrent Session

The goal of this session is to provide an overview of the process of creating an Education and Training program for Research Administration, looking at best practices and practical applications via various delivery methods.

Learning Objectives:

Lori Palfavi, Research administration, Rush University Medical Center

International Research Management – Unpacking the Puzzle
International, Overview, Concurrent Session

This session will examine a range of issues that arise when dealing with international research management.

Learning Objectives:

Dr Bryony Wakefield, Director, Research Development, Faculty of Medicine, Dentistry and Health Sciences, The University of Melbourne, Australia
Dr Bella Blaher, Senior Grants Officer, International, Research, Innovation & Commercialisation, The University of Melbourne, Australia
Julie Ward, International Research Manager, Division of Research, The University of New South Wales, Australia
Using Excel Effectively: Tips and Tools
Professional Development, Basic, Concurrent Session

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

Learning Objectives:

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

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

Opportunities for US Participation in EU Funded Research
Pre-Award, Basic, Spark Session

In recognition of the opening of the US National Institutes of Health's programmes to European researchers, any legal entity established in the United States of America is eligible to receive Union funding to support its participation in projects supported under all topics in calls under the Societal Challenge 'Health, Demographic Change and Well-Being'. This session will give you an overview of the funding programme and the opportunities for US participation.

Ylva Linderson, Financial Advisor International Grants, Karolinska Institutet, Sweden

The Succession process of a Grants Office - What Can be Learnt from Our Journey
Career Skills/Professional Development, Basic, Spark Session

This session will describe the succession of the Grants Office at Umeå University from an anonymous and loose group into a cohesive unit with a well-developed working model. In the session the foundation of our success will be described from our work on: team development and knowledge development  Service-thinking Contact building measures  Quality development  Working methods development  Strategic planning and external analysis

Anders Wennström, Associate Professor Grants Office, Umeå University, Sweden

12:00pm – 12:45pm  Lunch
12:45pm – 1.15pm  Regional Business meetings
Region IV in Gold Coast
Region VIII in French Room
1:30pm – 2:15pm  Tuesday Concurrent Sessions
USDA/NIFA Update (Via Videoconference – Specifically Adobe Connect)

Federal, Overview, Concurrent Session, Beginner

The National Institute of Food and Agriculture (NIFA) is an agency within the U.S. Department of Agriculture (USDA). Congress created NIFA through the Food, Conservation, and Energy Act of 2008. NIFA replaced the former Cooperative State Research, Education, and Extension Service (CSREES), which had been in existence since 1994. The Office of Grants and Financial Management (OGFM) supports NIFA’s mission of advancing food and agricultural science by administering grants, cooperative agreements, and other federal financial assistance with policy, funding, and oversight. This session will provide participants with the opportunity to meet OGFM staff and learn more about NIFA and its financial assistance efforts.

Learning Objectives:
- Participants will understand upcoming changes to NIFA policies and procedures.
- Participants will learn about current and future NIFA budgets and agency priorities.

Lisa Scott-Morring, MS, MSHS, CRA. Policy Branch Chief, Policy and Oversight Division
Cynthia Montgomery, Division, Director, OGFM
Erin Daly, Senior Policy Advisor, OGFM, NIFA
Melanie Krizmanich, Senior Policy Advisor, Policy Branch, NIFA
Edward Nwaba, Division Director, Awards Management Division, NIFA
Bart Hewett, Director, Planning, Accountability and Reporting Staff
Office of Grants and Financial Management (OGFM)
National Institute of Food and Agriculture (NIFA)
United States Department of Agriculture (USDA)

Developing a Training and Outreach Program for Your University

Concurrent Session

Training is not just about opening your mouth and speaking about a topic...it’s really about sharing what is helpful to equip people, address their needs, and help them be the best in what they do.” – Myron Sta Ana

This session will cover how a formal training and outreach program was developed and implemented. Discussion will include the process of formalizing the objectives of the training program, the development of the course content, and the procedures for managing and evaluating a large and complex training program. Attendees will be asked to participate in discussion on how they handle centralized training and outreach on their campus.

Learning Objectives:
- Participants will learn strategies for establishing and managing a training program on their campus.
- Participants will share information and best practices as relates to training and outreach activities at their institutions.

Kim Groller, Sponsored Programs Training and Outreach Coordinator, University of Illinois, Urbana-Champaign

How Do Sponsored Projects Support the University Mission?

Track, Beginner, Concurrent Session

Most university mission has three primary elements: teaching, research and public service. Sponsored project supports the university mission in various ways. This basic level session will establish the larger context for understanding sponsored project and sponsored agreements. This session will provide an overview of how the academic mission of a university drives the fundamental expectations of academic freedom, openness in research, and dissemination of research results. With
these expectations as the basis, we will examine select sponsored agreement provisions related to data rights, publications, and intellectual property.

Learning Objectives:

- Attendees will gain an overview of the larger context underlying university sponsored activities.
- Attendees will gain an understanding of the fundamental principles underlying sponsored agreements.

_Eugenie Chao, Grants Officer, Northwestern University_

**Uniform Guidance: Where Are We Now?**

*Senior, Intermediate, Concurrent Session*

The Uniform Guidance (UG) was implemented, mostly, on December 26, 2014. At last, agency implementations were released, and we heard about the plans for the Research Terms and Conditions. Research administrators spent much of 2014 trying to understand what was written and to influence OMB to make corrections in the language so we could then initiate dozens of changes in policies and procedures on our home campuses. How’s that working? This session will explore what we have learned during the UG’s first five months of life. We will also discuss where the pressure points are located and what we can realistically hope to discover later in the year. This will be an opportunity for a good conversation and exchange of ideas. Please come and share your experiences in this senior forum.

Learning Objectives:

- Participants will gain an understanding of the OMB uniform guidance on federal financial assistance awards.
- Participants will also learn how the agencies have implemented the new federal guidance and how other universities are applying it.
- Participants will understand some key pieces of the guidance that are still under development.

_Kim Moreland, Associate Vice Chancellor for Research and Sponsored Programs, University of Wisconsin-Madison_

_Jennifer Lassner, Asst. Vice President and Exec. Director, Division of Sponsored Programs, University of Iowa_

**Ensuring Post-Award Financial Compliance Through the Pre-Award Process**

*PUI, Beginner, Concurrent Session*

Central State University uses the pre-award approval process to review proposed activities to ensure compliance with financial guidelines. As a combined office, we administer externally funded programs from “cradle to grave”. Therefore, we use this authority to guide faculty members to request only allowable costs during proposal development. Post-award personnel review and approve the proposal transmittal form and budget justification for all proposals prior to submission. The budget is reviewed for compliance with university policies regarding matching costs, personnel commitments, new programs, and space requirements. It is also reviewed for compliance with effort level, compensation and other allowable activities.

_Morakinyo A. O. Kuti, Director, Office of Sponsored Programs and Research, Central State University_

_Tina A. Castonguay, Grants Manager – Central State University_

**What’s Happening Here? Using Metrics to Understand Research Offices**

*Senior Management, Advanced, Concurrent Session*

We are constantly talking about dwindling resources and increasing demands on our work. The buzz phrase is often “unfunded mandate.” But it can be so hard to quantify actual workloads and be able to convey the effects of under-
resourced or inefficient operations to those who can help make a change. One method to look for efficiencies or ways to communicate your needs is to develop metrics. Whether trying to define office throughput, shore up current processes, or influence business decisions, metrics can be a powerful tool to success.

Learning Objectives:
- Understand the values and principles behind collecting metrics
- Identify concrete steps to begin collecting metrics at your own institution
- Discover how to use metrics to introduce efficiency of process and drive business decisions

Heather Offhaus, Director, Grant Review & Analysis, University of Michigan Medical School
Jenna Lee, Director, Research Enterprise Solutions, Huron Consulting Group

NIH Grants Management for International Organizations
International, Overview, Concurrent Session

This session will focus on NIH Grants Management for International grantees covering the main financial policies and compliance requirements.

Learning objectives:
- Information on grant and funding policies
- Tips and resources to effectively manage awards for non US entities

Mary Kirker, Chief Grants Management Officer, Grants Management Program, DEA, NIAID, NIH, DHHS
Eva Björndal, Team Leader Post-Contract Office, Karolinska Institutet, Sweden

Designing and implementing a Web-Based Financial Management Dashboard
Financial/IT, Overview, Concurrent Session

To improve financial management, the Department of Medicine at the University of Wisconsin, Madison created a web accessible dashboard for department administrators, dean’s office and central sponsored research office staff. The dashboard provides a customized worklist for the individual user to prioritize and manage workflows; facilitates communication between the department and the central sponsored research office; standardizes the award closeout process and automates certain manual processes; tracks non-financial sponsor required deliverables; stores correspondence and historical information in a single integrated system; provides management reports to assess portfolio performance. The dashboard has generated great enthusiasm among administrators across the UW Madison campus. This session will demonstrate the dashboard and discuss its performance improvement impact.

Ronald Ravel, CPA, Assistant Director, Business Services, Chief Financial Officer, Department of Medicine, University of Wisconsin School of Medicine & Public Health
Amy Johnson, CPA, Lead Accountant, Reporting and Data Management, Department of Medicine, University of Wisconsin School of Medicine & Public Health
Bridgett Molinar, Accountant, Division of Cardiovascular Medicine, Department of Medicine, University of Wisconsin School of Medicine & Public Health
How to Get the Complexity out of Research Administration
*Professional Development, Basic, Discussion Group*

Ways forward to simplify administrative management of contract research by increasing the professionalism at the same time – a trusting issue?

Bruno Woeran, Advisor Lappeenranta University of Technology EU – Research Management & Innovation Networks

Professional Development for Research Administrators
*Professional Development, Basic, Spark Session*

This session will review the ways in which a research administrator can gain more professional expertise and professional recognition with the profession. The discussion will include masters' programs in research administration, obtaining the Certified Research Administrator credential, and growth through volunteer opportunities with NCURA on both the regional and national level.

Jeff Ritchie, Lewis University

2:30pm – 3:30pm  **Concurrent Sessions**

**Grants School: Faculty as Students**
*Predominantly Undergraduate Institutions (PUI), Beginner, Concurrent Session*

Faculty complaining that heavy teaching loads prevent them from pursuing external funding? Learn how one predominantly undergraduate institution approached eliminating that obstacle and provided faculty with skills and tools needed for more successful grantseeking.

Jeannie Neal, Director of Grants and Sponsored Programs, University of Indianapolis

**Federal Agencies for Foreign Applicants**
*Federal/International, Overview, Concurrent Session, Beginner*

This session will be an introduction to US programs that are open to international participation. It will be overview of aspects of the application which a foreign applicant must consider and will cover both pre-award issues and non-financial compliance.

Learning Objectives:
- Participants will learn about US agencies that welcome foreign participation.
- Participants will learn about compliance issues which need to be addressed upon application and granting of awards from US agencies.

Laura Plant, Grants Specialist, Grants Office, Faculty Office – Research Office, Karolinska Institutet, Stockholm

Tiina Berg, Senior Research Funding Advisor, Research Funding Services, University of Helsinki, Finland

**OMB Uniform Guidance: High Priority Items for Universities**
*Senior Management, Overview, Concurrent Session*
This presentation and interactive discussion will focus on key issues and opportunities in implementing OMB Uniform Guidance. Discussion will center on six high priority areas including Administrative/Clerical and Programmatic salaries, Computing devices, Procurement, Subrecipient Monitoring, Internal Controls, and Closeout. This session will most benefit those who have begun to implement Uniform Guidance at their institutions.

Learning objectives:

- A deeper understanding of overarching requirements and the associated implementation of each topic area

**Mike Daniels**, Senior Associate Controller & Executive Director, Northwestern University  
**David Lynch**, Executive Director of Sponsored Research, Northwestern University

### Understanding University F&A Basics and associated issues

This session will provide a high-level view of facilities and administrative (indirect costs) policies and how an F&A rate is developed and calculated. (No green eye shades needed) The objective is to offer an understanding of F&A costs to explain and defend the validity of these real costs to be reimbursed to your institution. This session will also address other issues, such as cost sharing, equipment depreciation, space issues, F&A cost return policies and early preparation as related to the F&A cost process. This is not your typical indirect cost session that will leave you scratching your head at its conclusion. You will better understand the issues and the structure of indirect costs and the fact that they are real costs, not monopoly money. You can then convey this information to your leadership and research community, which is a definite weakness and oversight at most institutions. Don’t be afraid to deliver this information to your faculty, they need to understand this and other issues we will be discussing.

Learning Objectives :

- Gain an overall knowledge for the various components of F&A costs
- Understand F&A costs in order to explain and defend the validity of the costs
- Understand related issues that may have an impact on the development of the F&A cost rate

**Charlie Tardivo**, Senior Consulting Associate, Attain, LLC

### Career Transitions and Advancements

**Professional Development, Basic, Concurrent Session**

Panelists will discuss how to build a research administration resume, positioning for career transition, job search skills, and using your network

**Beth Seaton**, Director of Sponsored Research, University of Illinois, Chicago  
**Bruno Woeran**, Advisor Lappeenranta University of Technology EU – Research Management and Innovations Networks  
**Kathleen Furr**, Assistant Director of Research Administration, University of Illinois at Springfield

### Effective Leadership: Implementing and Managing Change

**Senior Level Research Administration, Advanced, Discussion Group**

John F. Kennedy once said “Change is the law of life. And those who look only to the past or present are certain to miss the future.” His philosophy on change holds true in the field of research administration as well. While the research administrative lifecycle of Submission Negotiation Award Closeout will remain, it is inevitable the way we manage this process will change. This discussion group can be seen either as a continuation to the Monday concurrent session entitled the same or as a separate discussion group. Come and ask questions relevant to your institution!
**David Richardson**, Associate Vice Chancellor for Research, University of Illinois, Urbana-Champaign  
**Amy Brooks**, Assistant Director of Sponsored Programs, University of Illinois at Urbana-Champaign  
**Kim Groller**, Sponsored Programs Training and Outreach Coordinator, University of Illinois, Urbana-Champaign

### Differences Between the US and EU Affecting International Research Collaborations  
**International, Basic, Concurrent Session**

Differing legislation between the US and European countries creates obstacles when researchers want to collaborate across borders. This session will highlight some of these obstacles – primarily affecting administration of ethical approvals, biobank samples and material and data transfer agreements – and will also suggested solutions for removing or moving around the obstacles.

**Cecilia Björkdahl**, Project Manager, Karolinska Institutet, Sweden  
**Jon Zurn**, Mayo Clinic, Rochester

### Subrecipient Monitoring from the Department Perspective  
**Pre-Award, Intermediate, Concurrent Session**

Much has been said in the past few years about subrecipient monitoring. Each of our institutions has written its policies and procedures. We hear much about it at NUCRA meetings. We hear much about it from various consulting firms. What we haven’t heard much of is what’s happening out in the departments were the policies and procedures meet the real world. We’ll talk about what the federal policies say, what our institution policies and then we’ll talk about the reality on the ground. We like this to be an interactive session because we are just as interested in hearing your experiences as you might be in hearing ours. So bring your questions, comments and perhaps dark sunglasses as we share the good, bad and ugly of the wonderful world of subagreement monitoring at the department level.

**Jim Maus**, Senior Research Administrator. Washington University in St. Louis  
**Megan Simonson**, Associate Research Administrator, Northwestern University

### Compensation for Personal Services  
**Financial, Discussion Group, Concurrent Session**

This discussion group will focus on how institutions are addressing Compensation for Personal Services and improving their internal controls to meet the requirements of the Uniform Guidance.  
Topics will include:

- How does the implementation of the Uniform Guidance impact my institution  
- As an institution do you need to change or upgrade your current effort reporting system  
- Changes to Certification Frequency  
- New Certification Methodologies (Project Certification, Payroll Certification, FDP Pilot  
- Policy Updates

**Learning Objectives:**

- Attendees will gain an understanding of how their peer institutions are handling Compensation for Personal Services and Internal Controls.

**Marty Bergerson**, Manager, Huron Consulting Group  
**Erin Farlow**, Senior Effort Coordinator, Office of Cost Studies, Northwestern University


**Negotiated Indirect Costs for Foreign Organization**  
*Professional Development, Basic, Spark Session*

**Martin Kirk**, Director, Office of Research Services, University of British Columbia, Canada

3:30 – 4:00pm  **Afternoon Break**

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

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**See No Evil, Hear No Evil ... Speak Not of Cost Transfers**  
*Financial, Basic, Discussion Group*

What is a cost transfer? What caused it? What can it result in? How do we document it properly? How to prevent it? And lately, what does the Uniform Guidance have to say about it? Cost Transfers might seem harmless enough in a short run. What we do not always realize is the myriad of problems they can create in the long run; or how preventable they are. This session will concentrate on understanding and prevention of cost transfers (after all, the best way to avoid speaking of a cost transfer is to prevent it from happening to begin with). This is an interactive session. Participants will be asked to discuss the examples and give suggestions. We encourage everyone to bring examples for discussion.

**Learning Outcomes:**
- Participants will be able to identify the cause of cost transfers, analyze their effect on the projects, and discuss methods of preventing them.

**Elena Semyovova-Smith**, Grants Officer, Post Award Services, University of Kansas  
**Anita Abel**, Assistant Director, Post Award Services Office of Research, University of Kansas

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**EPA Update**  
*Government/Federal, Beginner, Concurrent Session*

This session is a comprehensive review of what is new and developing with the Environmental Protection Agency Competitive Grants Program and receive updates for grant reporting requirements. Participants will learn about changes affecting their institution and new programs of interest to their researchers.

**Learning Objectives:**
- Participants will understand upcoming changes to EPA policies and procedures.
- Participants will learn about current and future EPA budgets and agency priorities.
- Participants will learn about EPA Competitive Grants and update to the Grants Reporting System.

**William Massie, Jr.**, Chief, Acquisition and Assistance Branch, Resource Management Division, Region 5

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**US Participation in EU-Funded Projects**  
*International, Basic, Concurrent Session*

This session will cover the topic of US participation in EU-funded research projects and will build on the challenges experienced within FP7 (law and jurisdiction, liability, intellectual property etc.) and apply them to H2020. It will also provide an overview of the main differences between FP7 and H2020.
Learning Objectives:
- Participants will have a better understanding of the challenges and success of EU funded projects

**Bart Janse**, Legal Officer, Common legal support service, Directorate-General for Research and Innovation, European Commission, Brussels

**Change Management on a Global Scale**
*Professional Development, International, Basic, Concurrent Session*

Research Administrators never rests! The global funding landscape is changing constantly and this requires changes in our daily work, processes and structures. How can we deal with this in an effective way? How can we bring all staff members on board and up to date, how should we train them and help them identify fields of importance? Some changes require the approval of the board and/or additional resources. How you convince your leadership of the importance of these changes and how do you justify it? Are there special indicators for change management related to international projects?

**Agatha Keller**, Co-Head EU GrantsAccess, International Research Programmes
*University of Zurich/ETH Zurich, Switzerland*

**Grant Writer: Is it worth to hire one?**
*Professional Development, Basic, Discussion Group*

This discussion group will discuss whether or not it is worth hiring a grant writer. If so, what is the most important selection criteria? Degree level? Degree field? Experience? Or computer skills?

**Krisztina Cziner**, Aalto University, Finland

**Managing Clinical Trials: The Case of the American University of Beirut (AUB)/Lebanon**
*Medical/Compliance, Overview, Concurrent Session*

This session highlights AUB’s conduct of clinical trials in accordance with AUB’s Federal Wide Assurance (FWA) with OHRP/DHHS and its Institutional Review Board (IRB), and in accordance with the “Declaration of Helsinki” (Amendment of Republic of South Africa 1996) and the current Good Clinical Practices recommended by the International Conference of Harmonization (ICH). It also pinpoints researchers/investigators compliance with membership requirements defined in the US Code of Federal Regulations (21 CFR56 and 45CFR46) of the Food and Drug Administration.

This session will take you through AUB’s clinical trials policies and procedures, different types of clinical trials, investigators’ responsibilities, documentation, agreement negotiations, execution of trials precisely, trials’ monitoring and follow up on payments and reporting.

The session will also highlight the involvement of AUB at the national level through its active participation on the national committee set by the Ministry of Public Health for the setting of Standards and Operational Guidance for Ethics Review of Health-Related Research with Human Participants.

Learning Objectives:

**Dr. Fadia Homeidan**, Director, Office of Grants and Contracts and Technology Transfer Unit, American University of Beirut, Lebanon
Research Administration in the Matrix

*Professional Development/Tools, Basic, Concurrent Session*

In a world of complex requirements and changing regulations, RAs need all the help they can get. The good news is that you likely already have the tools, but you just may not realize how powerful they can be. Discover some of the incredible resources available in Excel and OneNote that can assist you through the Matrix of complex budgets and sponsor guidelines.

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

*Jamy Rentschler,* Manager of Sponsored Programs Accounting, Iowa State University

Concierge Research Administration: The Shift to Customer Focused Sponsored Projects Support

*Pre-Award, Basic, Concurrent Session*

A panel discussion on two customer focused sponsored projects offices (Purdue and Lappeenranta University of Technology). Purdue launched a customer focused, service based Pre-Award support model in 2009. They are now developing initiatives aimed at providing a more seamless customer-focused experience to researchers from cradle to grave. Lappeenranta University of Technology is implementing the so-called Project Process Snake, which showcases the support for researchers according to their needs and wants throughout the life-cycle of the project. Discuss how these models of service have improved relations with researchers and their satisfaction levels. Share lessons learned through implementation and discuss potential pitfalls of these models.

Learning Objectives:
- Orientation to customer-focus
- Learning to adapt services to different need and wants
- Providing seamless cradle-to-grave support

*Amanda Hamaker,* CRA, CPRA; Director, Pre-Award, Purdue University

Bruno Woeran, Advisor Lappeenranta University of Technology EU – Research Management & Innovation Networks

How to Effectively Interact with Various Personality Types

*Professional Development, Overview, Concurrent Session, All Audiences*

Have you ever encountered someone that does not play well in the sandbox...it is their way or the highway? Or maybe someone refuses to sign their effort reporting form? Or maybe it is just that person that is always questioning or testing the waters... There are several different personality types and different ways to be successful working with them. Come and get ideas to work as a team and also share your strategies and success stories.

Learning Objectives:
- Overview of the major personality types you will meet in research administration and how to interact with them to get the best outcome.

*Diane Hillebrand,* Grants & Contract Officer, University of North Dakota

Kate Angevine, Research Administrator, Northwestern University

Perspectives on US Funding Process from an Old New EU Member State

*International, Basic, Spark Session*

The Grand-Duchy of Luxembourg is in the paradox situation of being an old member state of the EU, but concerning its academic structures, there are huge similarities to the new member states who joined the EU some ten years ago. This
session will show how a young university in a comparatively small European country has built up the needed knowledge and made its way into the US funding programmes - pre-award, post-award, and last but not least grants.gov, SAM, eRA Commons...

*Jasmin Rani Sinha,* Luxembourg Centre for Biomedicine, Luxembourg

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6:00pm – 10:00pm  **Tuesday Night Event**

Join us for a Taste of Chicago in the Gold Coast ballroom, featuring an array of Chicago culinary delights. We are honored to have local Chicago celebrity, Dee Alexander, perform her jazz and blues favorites. Ms. Alexander has received international praise for her work and most recently performed at the Kennedy Center and Symphony Hall. She is well acquainted with NCURA, and promises to help us celebrate!

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

*Located in the Princess Diana Suite.*

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Please wear your name badge to all events, including workshops, concurrent sessions, and evening networking events.
Wednesday, April 29

7:30am – 8:30am  Buffet Breakfast

8:30am – 9:30am  Concurrent Sessions

9:00am – 10:45am  Get Involved! Fair

9:30am – 10:00am  Morning Break

10:00am – 11:00am  Concurrent Sessions

11:00am – 12:00 pm  Closing note/Panel/Adjourn

Please wear your name badge to all events including workshops, concurrent sessions, and evening networking events.
Wednesday, April 29

7:30am – 8:30pm  Buffet Breakfast

8:30am – 9:30am  Concurrent Sessions

NSF Update (Via videoconference – specifically WebEx)
Federal, Overview, Concurrent Session, Beginner

Description
This session is a review of what is new and developing with the NSF’s programs, policies, people and budget. Participants will learn about changes affecting their institution and new programs of interest to the researchers.

Learning Objectives:
- Participants will understand upcoming changes to NSF policies and procedures.
- Participants will learn about current and future NSF budgets, agency priorities, and involvement in electronic initiatives including advances with Research.gov.

Roger Wareham, Grant Policy Specialist, Office of Budget, Finance & Award Management, Division of Institution and Award Support, National Science Foundation

Video Conference

CDMRP: Expanded Funding for Medical Research
Federal, Overview, Concurrent Session

The Congressionally Directed Medical Research Program (CDMRP) is a U.S. federal allocation supporting medical research. This historically little known program offers funding for a wide array of research interests—from ALS to PTSD to Breast Cancer. Most importantly, its budget has been expanding steadily since its inception. While administered by the Department of Defense, awards go well beyond specific military or veterans interests.

This session will provide a profile of this unique program, key funder interests and expectations, and important aspects of award criteria. Anyone interested in pursuing these federal dollars will gain a solid understanding of what it takes to write a winning CDMRP proposal.

Jon Zurn, Mayo Clinic, Rochester

Yes, You Can Improve!
Professional Development, Basic, Discussion Group

Lead by 2 seasoned research administrators from the University of Michigan and Washington University in St. Louis, this discussion group will give participants the tools to improve their processes at work. High level Lean techniques will be discussed and as well how to map processes. The discussion group leaders will share their experiences with process improvement to give examples as how process improvement can work in any organization. Group participation will also occur with the group coming together to create a process map which will give the participants valuable hands on experience with process mapping and case studies will be reviewed.

Melissa Karby, Administrative Manager Associate, University of Michigan-Ann Arbor
**Kaslina Love Mosley, PARC Manager Research Administration, Washington University**

**Implementing a Three-Pronged Leadership Approach of People, Processes, and Service**

**Senior, Advanced, Concurrent Session**

Leadership comes in many forms, but works best when considering people, processes and service. Many universities have utilized a “lean higher education” process to look at research administration operations. Oregon State University is undergoing such a process with its pre- and post-award processes. This session will provide a case study on how leadership can improve processes and balance people, processes and service at the same time.

**Learning Objectives:**
- Attendees will learn about the “lean process” and how it can be applied to higher education and lessons learned in using this methodology.

**Pat Hawk, Director of Sponsored Programs, Oregon State University**

**The Electric Slide - Electronic Research Administration Implementation Discussion**

**Overview, Discussion Group**

Let’s spend an hour talking about implementing electronic research administration systems – planning the project and successful deployment. This session will focus on the project implementation methodology used at the University of Chicago and lessons learned from our successful projects. For background on the UChicago eRA system, AURA (Automating University-wide Research Administration), please see [http://aura.uchicago.edu/](http://aura.uchicago.edu/)

**Lynda S. Wolter, Deputy Director, University Research Administration, The University of Chicago**

**Becoming a CATALYST**

**Professional Development, Basic, Concurrent Session**

The majority of learning as a Research Administrator takes place on the job, where knowledge is put to use and theory turned into practice. We believe in the apprenticeship approach to development, in which each consultant is expected to have both a willingness to learn and an ability to mentor. On the learning side, this means being comfortable taking on tasks and responsibilities you have not performed before, or working on an unprecedented researchers problem. As a mentor, you are not only responsible for your own development, but for the development of your colleagues as well. In such an environment, open and honest feedback is critical to everyone’s development. Within our institutions, we are working hard to develop a culture that values and fosters this. This discussion group is about thinking differently and creatively about current and future services by better anticipating evolving researchers needs and processes plus by tapping the collective intelligence of the NCURA network.

**Learning Objectives:**

**Annika Glauner, EU Grants Access, University of Zurich/ETH Zurich, Switzerland**

**Conversing across the globe – how to develop and maintain international relationships**

**International, Basic, Concurrent Session**

International collaborations can face significant challenges from differing priorities, time zones to communication tools. The session explores best approaches to developing and maintaining good relationships with your international colleagues.

**Dr Bryony Wakefield, Director, Research Development, Faculty of Medicine, Dentistry and Health Sciences, The University of Melbourne, Australia**
**Funding Opportunities: Best Practices for Identifying, Disseminating, and Tracking**  
*Pre-Award, Intermediate, Concurrent Session*

In today’s digital world, there are many ways for pre-award research grant administrators to find grant opportunities and disseminating them to specific faculty members. From manually searching through Grants.gov and FedConnect to purchasing automated software systems such as MyWebGrants and Grant Search Engine, there are many ways to find grants. But what are the best options for grant offices that serve only one small department, or serve an entire college or university? Do we need to know each faculty member’s research in order to find the right opportunities? How do we distribute grant opportunities that faculty will read? And how can we track deadlines and streamline reminder processes without wasting valuable time? The proposed concurrent session goes beyond identifying and learning how to use the most popular grant search engines and software tools. By focusing on the best practices of grant searching and, dissemination, research administrators will learn effective ways to reduce the amount of time they spend searching and to streamline research tasks.

**Learning Objectives:**
Participants will be able to:
- Determine the types of searching and dissemination strategies that work best for their institution
- Understand the importance of tracking deadlines to organize future grant searches
- Implement specific strategies to save time, increase efficiency, and reduce frustration
- Participants should have a basic knowledge of research grant opportunities and how to search for them.

_Michelle Schoenecker, Senior Proposal Development Manager, University of Wisconsin-Milwaukee_

**Stimulating Inter-Institutional Collaboration**  
*Intermediate, Discussion Group*

Collaborations, especially those within interdisciplinary teams, are widely seen as core to the successful investigation of complex research problems. In addition, collaborations between different institutions, whether regional, national or international, can help deepen the impact of a research study, stimulate fresh ideas, and attract funding from agencies wanting a very broad impact with their awards. Yet, creating and fostering these collaborations requires investment from time-strapped investigators who are engrossed their own “ivory towers.” How can research administrators best galvanize collaborations during today’s busy work environment? How does one encourage PIs to look outside of their familiar circles and reach across institutional boundaries? What kinds of events and methods entail the best investment of time by the researchers and the research offices? To whom should our efforts be targeted—junior or established faculty? How does one include non-academic partners? Led by research administrators from two universities in a shared geographical region, this discussion will address tools to facilitate networking among different institutions. Discussion leaders will share their own successful and unsuccessful experiences while seeking input about successful models from participating attendees.

**Learning Objectives:**
In this session participants will:
- Articulate benefits of inter-institutional collaboration
- Understand challenges and obstacles to networking efforts across institutions
- Articulate types of goals sought through networking events/methods
- Generate best practices in facilitating collaboration-building events

_Patience Graybill, Pre-Award Research Administrator, Southern Illinois University Edwardsville_  
_Emil Beck, Research Administrator, St. Louis University_
Managing Relationships in International Grants: Preventing Submission Barriers

*International, Basic, Spark Session*

This Spark Session will highlight the logistical hurdles that often arise when working with international collaborators on grant applications. Most aspects of these limitations are in the realm of communication difficulties, and differences in institutional business processes. After reviewing the most common struggles in this arena, we will discuss and brainstorm tips and tricks to plan ahead to anticipate and avoid these issues.

*Kate Angevine, Research Administrator, Institute for Public Health and Medicine*

9:30am – 10:00am  **Morning Break**
10:00am – 11:00am  **Concurrent Sessions**

**NIH Update (Via Videoconference)**

*Federal, Beginner, Concurrent Session*

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

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

*Mary Kirker, Chief Grants Management Officer, Grants Management Program, DEA, NIAID, NIH, DHHS*

**What is PCORI?**

*Pre-Award, Basic, Concurrent Session*

This session will review what the Patient-Centered Outcomes Research Institute (PCORI) is, the philosophy, and what the expected outcomes of this Institute are. The types of PCORI funding will be discussed, as well as the difference between PCORI funded research and NIH funded research. Finally, a brief discussion of the current state of PCORI and future directions.

Learning Objectives:
- A brief overview of what PCORI is and the expected outcomes of the research funded by PCORI
- How PCORI differs from NIH
- What is needed to support your institution’s investigators to be funded by PCORI

*Mary Jane Welch, Rush University*

**PI Transfers. In and Out. What is it all About?**

*Senior Management, Advanced, Concurrent Session*

The goal of this session is to provide an overview of the grant transfer process in various situations and how to manage the process effectively.

Learning Objectives:
• Understand the various grant transfer scenarios.
• Identify necessary tasks to maintain compliance during grant transfers.
• Anticipate potential problems in the process in the process and communicate effectively with all parties involved.

Lori Palfalvi, Research Administrator, Rush University Medical Center
Daniel S. Rademacher, Manager, Grants and Contracts Administration, The Robert H. Lurie Comprehensive Cancer Center, Northwestern University

Financial Risk Management - Experiences From Foreign Organizations
International, Overview, Concurrent Session

This session will focus on financial risks that are common to foreign institutions receiving US federal funding. No project is completely risk-free, but which financial risks may be necessary to accept? And which risks should be avoided at any cost? Do you have the right internal controls and policies in place in order to identify and mitigate financial risks? This session will focus on the most common financial risks and will be based on the panel’s own experience from Foreign Organization system Reviews (FOS) carried out by NIAID

Eva Björndal, Team Leader Post-Contract Office, Karolinska Institutet, Sweden
Tiina Berg, Senior Research Funding Advisor, Research Funding Services, University of Helsinki, Finland

Hot Topics for Leaders in Research Administration
Senior Management, Advanced, Concurrent Session

This panel discussion will cover current hot topics of concern for senior-level leaders in research administration, both in the U.S. and internationally. Participants are invited to share the current challenges they face while exploring solutions to those challenges.

Learning Objectives:
• Participants will be able to identify and describe issues that leaders in research administration are currently facing.
• Participants will discuss and propose actions to address current hot topics in the field.

Martin Kirk, Director, Office of Research Services, University of British Columbia, Canada
Tricia Callahan, Director of Proposal Development, Miami University

Non-financial Compliance and Regulations between US and EU
Compliance, Basic, Discussion Group

This discussion group will focus on some of the issues that arise when working with colleagues across the Atlantic. We will discuss difficulties regarding non-financial compliance and regulations that are experienced in joint projects and ways in which they can be handled from the perspective of an EU-country.

Learning Objectives:
• Identify contractual issues that arise in joint projects related to differing laws and regulations in the US and an EU-country.
• Discuss some regulations that differ between the US and and EU-country and how they can be managed.
• Examine non-financial compliance issues that may arise in joint projects.

Laura Plant, US Funding Specialist, Karolinska Institutet Sweden
Cecilia Björkdahl, Project Manager, Karolinska Institutet, Sweden
Balancing Act
*Professional Development, Basic, Discussion group*

Description
Work in a smaller research office or department? Having trouble balancing work/home life? Well, this discussion group is for you! We will discuss strategies and techniques to help give your life a little more balance, while learning from others on what works for them.

Learning Objectives:
- Learn strategies and techniques to better manage a home/work life balance.

*Aaron Crandall, Dept Research Manager, University of Wisconsin, Madison*

Uniform Guidance: Utility Cost Adjustment and F&A Updates
*Track, Level, Concurrent Session*

This session will focus upon Uniform Guidance changes that may impact University F&A Proposals and rates. It will place primary emphasis upon the vital Utility Cost

Learning Objectives:
- Attendees will gain a full understanding of the UCA and how to include this within their F&A Proposals.
- Additionally, participants will learn of other UC changes which may also impact their Proposals.
- The emphasis will be upon maximizing proposed F&A rates while remaining in compliance with federal regulations.

*Steve Bradley, Director, MAXIMUS*
*Jeff Gosrow, Senior Management, MAXIMUS*

Stimulating Research and Scholarly Activity through Faculty Incentives
*PUI, Basic, Concurrent Session*

It’s a common goal for many offices of sponsored programs: to increase the number of applications submitted and the amount of funding received. Join your colleagues in a rich discussion of the combination of faculty incentives – financial, time, human resource, other enforced rewards – that effectively stimulate research and scholarly activity. In this interactive session, you are also encouraging to ask questions, share experiences, and reflect on lessons learned for developing, implementing, managing, and funding faculty incentives.

Learning Objectives:

*Jeremy Miner, Research Manager, University of Wisconsin-Eau Clair*

Keep Your Best Research Administrators! NU’s Approach to Employee Career Development
*Professional Development, Basic, Spark Session*

You’ve got the best Research Administrators – how do you keep them? It is becoming increasing apparent that in order to retain key/critical staff, employers need to offer job opportunities that make use of and continue to grow employees’ skills and abilities. In order to “keep your best” you need to develop them. Learn how Job Families can help you do so

*Annette Czech, Sr Compensation Consultant, Northwestern University*
Using Social Media to Promote Research Programs

*Spark Session*

Forget the Information Age, we live in a social and mobile world. Social media can provide researchers the opportunity to connect, converse, disseminate, and collaborate in ways we never thought possible. While some skepticism about social media in the academic/healthcare world still persists, it is no longer a choice. It is the wave of the future. Learn how social media can integrated into scholars’ work to amplify and broaden its reach.

*Roger Knight*, Marketing and Communications Specialists, Institute for Public Health and Medicine, Feinberg School of Medicine, Northwestern University

11:00am – 12:00pm    **Endnote Panel Discussion**

Agatha Keller, Kim Moreland, David Richardson, Martin Kirk
Stay an Extra Day for the Academic Research Tour

After the educational sessions end on Wednesday, please join us on Thursday to visit several of the premier academic research institutions in Chicagoland. Tour participants will leave by coach bus from the Drake Hotel on Thursday morning and enjoy a narrated tour about the history of the area and points of interest along the way. Highlights of the day long tour will include:

Hyde Park – site of the Chicago World’s Columbian Exposition of 1893

The University of Chicago (http://www.uchicago.edu/) main campus is located in Chicago's historic Hyde Park neighborhood, an area that's home to an abundance of cultural and educational attractions. In Hyde Park, you'll find the world-famous Museum of Science and Industry (http://www.msichicago.org), as well as many other museums, ethnic restaurants, outstanding architecture (Ludwig Mies van der Rohe, Frank Lloyd Wright, Eero Saarinen, Helmut Jahn), cozy bookstores, and coffee shops. During the academic year, approximately 23,000 University of Chicago students, faculty, and staff are on campus each day. UChicago is also home to the University of Chicago Medicine (an academic medical center with 700 physicians and covers the full array of medical and surgical specialties), the first Heisman Trophy, the site of the first man-made self-sustaining nuclear reaction, more Nobel Prize winners than anyplace else in the world, and an abundance of open spaces and parks. In addition, the South-side tour will stop at the Illinois Institute of Technology (http://web.iit.edu/). IIT is located in historic Bronzeville neighborhood which hosts stunning residential architecture (Gothic, Romanesque and Queen Ann style Victorian mansions), multiple public art displays (MLK drive features Alison Saar’s "Monument to the Great Northern Migration," The Bronzeville Walk of Fame, and The Victory Monument), (http://www.choosechicago.com/neighborhoods-and-communities/bronzeville/), major league baseball (Chicago White Sox) and also is the site of multiple buildings designed by Ludwig Mies van der Rohe, who also chaired the university's department of architecture. The master plan of IIT was one of the largest projects Mies ever conceived and the only one to come close to achieving complete realization. (http://web.iit.edu/about/history/historic-architecture).

Illinois Medical District – established following the great Chicago Fire of 1871

Situated on Chicago's Near West Side, the Illinois Medical District (IMD) is the largest urban healthcare, educational, research and technology district in the nation. The District had its start in the 1870’s when Cook County Hospital, Rush Medical College, and the College of Physicians and Surgeons were established on the Near West Side. The cornerstone for the Medical Center was the building of Cook County Hospital in 1876. In 1877, Rush Medical College erected a building next to County at Harrison and Wood. Presbyterian Hospital (affiliated with Rush) was built in 1883. The University of Illinois at Chicago's origins in the District can be traced to the College of Physicians and Surgeons, founded in 1881. In 1913, the College became the University's College of Medicine. Today, the Illinois Medical District consists of 560 acres of medical research facilities, labs, a biotechnology business incubator, a raw development area, universities, and more than 40 health care related facilities. The IMD has 29,000 employees, 75,000 daily visitors and generates $3.4 billion in economic opportunity. The IMD is the largest urban medical district in the United States, and has the most diverse patient population in the country.
Northwestern Medicine, Magnificent Mile

Northwestern University’s School of Medicine was originally founded as the medical department of Lind University on October 11, 1859 and renamed the Chicago Medical College in 1863, the school affiliated with Northwestern University in 1870. In 1891, the name was changed to Northwestern University Medical School. It had occupied buildings on the near south side of Chicago from 1863 until the Montgomery Ward Memorial Building was constructed in Streeterville in 1926. Northwestern Memorial Hospital was created September 1, 1972 by the consolidation of two of Chicago’s oldest established hospitals – Passavant Memorial (founded 1865) and Wesley Memorial (founded 1888). Northwestern Memorial's predecessor hospitals had their roots in Chicago’s Lutheran and Methodist Episcopal deaconess movement, spiritual communities of women organized during the 19th century to provide for the sick and needy. Ann and Robert H. Lurie Children’s Hospital was started in 1882 as an 8-bed cottage, Lurie Children’s, formerly Children’s Memorial Hospital, has grown in size and capacity over the past 130-plus years. In 1954 the Rehabilitation Institute of Chicago (RIC) was founded by Dr. Paul B. Magnuson in a renovated warehouse on Ohio Street. Dr. Magnuson was a renowned orthopedic surgeon who became a devoted and passionate advocate for people with disabilities as the result of witnessing the personal tragedies of World War II while serving as the medical director for the Veterans Administration. Today, Northwestern Memorial Hospital, Northwestern Medical Group, the Rehabilitation Institute of Chicago, Lurie Children’s Hospital and Northwestern University medical and law schools have built a national reputation for excellence through a strong history of collaborative, interdisciplinary medical education and research, and is a premier academic medical center. Seven departments at Northwestern University Feinberg School of Medicine rank in the top 10 in their discipline in a list of National Institutes of Health (NIH) funding to medical schools, with an additional three departments in the top 20.

Participants will return to the Drake Hotel by bus or a short, 4-block walk along scenic Lake Michigan.

*Photos Chicago skyline: Martin Kirk*
## Program Committee

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

**Program Co-Chair (Chair Elect)**  
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**Program Co-Chair (Chair Elect)**  
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Marquette University
Patience Graybill  
Southern Illinois University, Edwardsville
Tracy Mrowczynski  
Northwestern University

**Track Leaders**

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<td>Laura Plant</td>
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<td>International &amp; Hot Topics</td>
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**Registration**  
Shannon Sutton  
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Susanne Rahner  
Yggdrasil, Germany
Bonnie Jean Zitzke  
University of Wisconsin, Madison

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Krisztina Cziner  
Aalto University, Finland
Megan Simonson  
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**Sponsor/Vendor Coordinator**  
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**Volunteer Coordinator**  
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