Full Program

Updated 10/25/2022

Reconnect and Rejuvenate

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Sunday, October 30, 2022	
Registration Desk Open 7:30am - 5pm	
AM Workshops 8:30am-12:00pm	
Workshops can be added to registration via NCURA website	

Room	Description					
Arizona 11	Preaward Research Administration Basics (01WS1)	Beginner	Amanda Snyder, University of Washington	Dennis Paffrath, University of Maryland College Park		One way to organize the many important research administration activities is by looking at them as part of the sponsored projects lifecycle. The preaward phase of the lifecycle includes the development, institutional review, and submission of proposals to external sponsors, as well as the review, negotiation, and acceptance of resulting awards. This workshop will provide a broad overview of topics that relate to fundamental preaward activities in sponsored projects administration and is designed for those who are new to research administration or for those who want a refresher on basic preaward topics. We will cover a variety of topics that impact preaward processes and responsibilities, including applicable rules & regulations; electronic research administration; compliance considerations at the preaward stage; proposal development, review, and submission; and more. We will explore how our actions during the preaward stage set us up for success during the post award management of an award. Come prepared for a lively discussion and to interact, learn, and share your experiences!
Arizona 12	Managing a Research Portfolio: A Department Perspective (03WS3)	Beginner	Csilla Csaplar, Stanford University	Sandra Logue, City of Hope		The role of the Departmental Research Administrator requires flexibility, significant communication skills, and the ability to navigate ever-changing priorities and policies. Managing a Principal Investigator's research portfolio involves more than just financial tracking and compliance; it requires a broad understanding of research operations, space and facilities management, human resources, the compliance world, and communication. To effectively manage a researcher's portfolio, the DRA needs to gain the trust of the researcher, learn about the research itself, and maintain an inquisitive approach. We will review the broad aspects of project management and explore some of the complex issues that may arise, including roles, financial modeling, overlapping effort/scope of work, conflict of interest, and collaborations. We will also review and discuss case studies to build on the skills required to maintain efficient and effective oversight of multiple complex portfolios.
PM Workshops 1:15pm - 4:45pm						

Room	Title	Level	Lead Presenter	Co-Presenter(s)	Co-Presenter(s)	Description
Arizona 11	Basics of Post Award Administration or Don't We Just Catch That at Closeout? (02WS2)	Beginner	Tim Reuter, Stanford University	Fran Visconti, Boston College		Big, medium, or small research institutions, we all share common challenges. One of the biggest is how to support and partner with departments to manage awards during the life of the award. Understanding and communicating sponsor terms and conditions as well as the reporting requirements early in the award helps make closeout quick and less contentious. It can also limit risk. This workshop will cover parts of the Uniform Guidance and how to apply them, challenges with various sponsors, dealing with audits and some case studies of real-life examples. Bring your questions, challenges, and even some solutions to share.
Arizona 12	New Leaders: Bridging the Beginning (04WS4)	Intermediate-Advanced	Alexa Van Dalsem, University of Colorado Boulder	Sylvia Bradshaw, Southern Utah University	Ashley Stahle, Colorado State University	As hiring managers, we often create a carefully mapped onboarding process to welcome and guide new hires. But when you're the new hire or recently promoted internal candidate into a leadership position, you may find that you are onboarding yourself! Taking on new roles in research administration with additional responsibilities can be daunting, hold multi-faceted new challenges, and appear without much direction. Where's the guidance on bridging the distance between "Where do I start?" and "Where I want to be"? Come attend an interactive and informative workshop from three individuals in Research Administration leadership positions. We'll discuss the opportunities and challenges, best practices and real-life experience, strategizing the first 90 days, and the modern-day challenge of becoming a new leader in a remote or hybrid work environment.
Arizona 12	**ALL REGISTRANTS WELCOME FOR FREE SESSION (6:00pm - 7:00pm): Saguaro Cactus Presentation– William L. Bird Jr, Sponsored by the University of Arizona College of Engineering;** In the Arms of Saguaros: Iconography of the Giant Cactus. In this carefully and thoroughly researched and curated contribution, William L. Bird helps us piece together and understand a key element of Southwestern identity, how the saguaro became a global icon. https://tumamoc.arizona.edu/proceedings-desert-lab/arms-saguaros					

Monday, October 31, 2022

Registration Desk Open 7:30am - 5pm

Local Hike: 6:45 AM-7:45 AM (6:20 AM Meet-up in Lobby): Ana Rodriguez, University of Arizona employee with the College of Engineering, will be leading hike at the Starr Pass resort.

Join us for a sunrise hike on the beautiful Hidden Canyon Trail. This hike offers a great opportunity to experience the desert in early morning light and if we are lucky, we might see some wildlife! The trail is 1.5 miles and has an elevation gain of approximately 350 feet and is considered moderately challenging. The terrain is very rocky, and we will be surrounded by cacti and other spiny desert plants; long pants, and sturdy, closed-toe shoes such as hiking boots, day hikers, or sneakers are recommended. Meet in the lobby at 6:20 AM, we will walk across to the trailhead. We will allow an hour for this hike but will be mindful of time to ensure you get back to your rooms in plenty of time to prepare for your day. Please make sure to be well hydrated and bring a water bottle.

Breakfast 7:30am - 8:30am

Conference Welcome & Keynote Address (8:30am - 10:00am)

Room	Description
Arizona Ballroom 6 & 7	Meeting Welcome: Bryony Wakefield, PhD, Executive Director, University of Glasgow/Vice President of the Board of Directors-NCURA
	Meeting Welcome: Sangita Pawar, PhD, MBA- Vice President of Operations at Research, Innovation and Impact, University of Arizona
	Keynote Speaker: Luis E. Coronado Guel, Ph.D.- Director| SBS-Mexico Initiatives, University of Arizona. Mexico's Day of the Dead tradition has been declared intangible cultural heritage of the humanity by UNESCO since 2003. How did this celebration become worldwide? Day of the Dead is a cultural and historical construction that condenses European and Pre-Hispanic elements. It is an expression of the colorful, diverse, dramatic, and amazing mixture of symbolic features created in Mexico for centuries around death. This lecture will explore the history and meaning of this cultural expression.

Sessions 10:45am - 11:45am

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 6	Federal	NSF TIP Directorate Update	Beginner	Concurrent	Graciela Narcho, Deputy Assistant Director		Update on the latest NSF Technology, Innovation and Partnership (TIP) Directorate

Room	Track	Title	Level	Type	Presenter 1	Presenter 2	Description
Arizona 7	Compliance	Foreign Influence and Engagement	Intermediate	Concurrent	Rosie Madnick, The Lundquist Institute	Betty Rasmussen, University of Colorado Boulder	There is no comprehensive or common definition of what constitutes foreign engagement or influence. However, in the context of the research environment, it is used generally to describe the efforts by foreign actors, often foreign governments, to unduly influence the funding agency peer review process, illegally or illicitly obtain research results prior to publication (this may include trade secrets not intended for publication), or divert US origin technology to benefit foreign parties. Learning Objectives: • Define what constitutes foreign engagement or influence • Recognize requirements for activity disclosures • Describe consequences of failure to disclose foreign collaboration • What actions to take when issues arise
Arizona 12	Human Capital/DEI	Make room on your broom: 10 people and skills to pick up as an early-stage Research Administrator	Beginner	Concurrent	Tracy Gatlin, University of Montana		I learned the hard way, you don't have to. This session will provide actionable objectives for early-stage Research Administrators to gain knowledge, build relationships, and foster experiences that encourage successful growth of the individual. Learning Objectives: Identify 10 action items to foster early-stage Research Administrator development. Emphasis will be on relationship building and resources for critical knowledge areas. The session will include an "ask me anything" style Q&A.
Arizona 11	Department/ PUI	Put me in Coach: Bulk up your Training Program	Beginner	Concurrent	Frank Castañeda, Stanford University	Kathryn O'Hayre, Colorado State University	o Assess offerings, skills, techniques to enhance learning for your Research Administrators across the institution. o Taking what we taught on the court to the classroom with RA onboarding fundamentals, techniques and resources. o Build on your existing training programs (continued education) o Experience levels- coaching up- participants based on experience: new to the field, mid-level or high level (internal v. external resources). o Coaching fundamentals, facilitating how-to's within your own dept, creating support groups. o Challenges of Coaching in-person vs remote vs hybrid.
Arizona 5	PreAward	I Know What You Did Last Cycle – Methods for Addressing Late Proposals and Repeat Offenders	Intermediate	Discussion	Jaclyn Lucas, City of Hope	Jason Park, University of California Irvine	In this discussion group, we'll discuss our institutions' formal and informal policies for internal proposal deadlines. We'll discuss what has worked for us and how institutional culture can have a substantial impact on what will work at your institution. Topics include: Establishing expectations of the researchers, creating guidelines and obtaining support from Senior leadership, enforcing policy adherence and bad actors, data tracking, and more. Prepare to share and learn from each other! Learning Objectives: Learn strategies for creating a sustainable proposal review deadline practices that you can implement at your own institution, streamline the proposal request process from researchers, and weigh the pros and cons of adding a late proposal to queue.
Arizona 10	Human Capital/DEI	More than "Witchful" Thinking or a Little Hocus Pocus: Using data to drive Research Administration strategies and staffing.	Advanced	Concurrent	Winona Ward, University of California San Francisco	Lei Zheng, University of California San Francisco	Participants will learn how to leverage surveys and data to track volume, productivity, stakeholder satisfaction, and quality improvements, as well as justify staffing and organizational changes, policy and procedure changes, and budget increases. Examples will be given for University of California San Francisco Pre-Award Office with > 200 staff supporting operations including full proposal development and submission, subcontracting, industry contracting, and clinical trial activation. We will describe how collaboration with Post-Award, survey instruments and detailed analytics have been used over 5 + years to demonstrate progress and drive strategic initiatives for a UCSFs >$1.5B/YR research enterprise. Learning Objectives: Presenters will demonstrate how using surveys and data can be used to justify changes to staffing, organizational and operational changes, as well as budget increases. Participants will be able to relate readily available information (e.g. number of proposals) to pre-award office productivity.Participants will understand the importance of customer satisfaction surveys, and how to implement at their institution.

All Region Business Meetings & Lunch: 12:00pm - 1:00pm		
Room	Description	
Arizona 6	Region VI All Region Business Meeting & Lunch	

| Arizona 7 | Region VII All Region Business Meeting & Lunch | | | | | | |

Sessions 1:15pm - 2:45pm

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 6	Update	NIH Update	Basic/Overview	Concurrent	Ashley Alexander, National Institutes of Health		What's new at NIH? NIH staff will discuss new or upcoming revisions in policy and programs as well as other topics of interest
Arizona 5	Contracting	Complex Agreements and DUAs	Intermediate	Discussion	Russell Brewer, Stanford University		This session will be a high level discussion about various kinds of data use and other complex agreements. Come chat with Stanford's AVP of Research Administration and get your questions answered.
Arizona 4	PostAward	Inside the Closeout Cave	Beginner	Discussion	Leslie Rodelander, Cal Poly Humboldt		Close-outs: why they are important and how we can make them less batty by following a close-out checklist and putting an internal audit tool in place. Learning Objectives: • Have a clear understanding of the importance of close-outs in the award life cycle • Have a better understanding of what a complete close-out entails • Appreciate how instituting an internal audit practice can make close-outs less painful • Bonus objective: attendee may be able to start conversations at their institution about how improve their close-out process
Arizona 11	Department/ PUI	Research Administration and Partnerships: California Stories from two Institutions	Beginner	Concurrent	Perrilla Johnson-Woodard, Charles R. Drew University of Medicine and Science	April Walter-Brown, Charles Drew University of Medicine and Science	This session will focus on addressing the following questions: • What it means to be a small private HBCU/HSI in California? • How does this affect you in regards to research and administration? • How do you collaborate with other universities, especially in this time period where colleges focus on ensuring that top universities collaborate with HBCUs?
Arizona 12	PreAward	The Terrifying Task of Taming Large, Complex, Strategic Proposals	Intermediate	Concurrent	Shana McClelland, University of Arizona	Vince Borleske, University of Arizona	Large, complex, strategic (LCS) proposals often require more advanced understanding and ability than typical research proposals. Such proposals are often inter-, multi-, or cross-disciplinary, may involve significant collaboration with other departments, colleges, and institutions, and require more time, preparation, and resources than typical research proposals. While research development and proposal enhancement services offering support to these teams are becoming more and more common, research administrators are increasingly called on to assist with proposal coordination, budget development, internal process navigation, and documentation requirements for these labor-intensive projects. What do you do when you're called on to support a LCS proposal as a department or college-level research administrator? How do you know where to start and what your role will be? This session will explore how LCS proposals are typically defined by universities, what features are indicative of a LCS proposal, specific roles and responsibilities involved in managing LCS proposal opportunities, how and when to identify and request additional support/resources, and identify additional learning and development opportunities. Learning Objectives: Identify when a solicitation may meet the definition of a large, complex, or strategic proposal, what institutional resources may be available to a research administrator working on such a proposal, and what role(s) the research administrator may play in proposal development and submission. Read and identify key features of a large, complex, or strategic proposal solicitations, identify what questions to ask and identify strategies for managing institutional involvement to provide quality support for these proposals.
Arizona 10	Contracting	Ghosts, Goblins and Bats! Navigating the spooky world of the FAR	Beginner	Concurrent	Erin Kinne, Stanford University	Jennifer Scerri, Stanford University	This session will be a basic overview of the FAR: What is the FAR? What is the purpose? How does one approach FAR clauses - how to look up prescriptions, determine applicability and consider appropriate alternatives, and how to institutionally mitigate any problematic clauses.

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 7	LeadMe	LeadMe Graduate Presentations: Group 1	All levels	Concurrent	LeadMe Graduates: Group 1		The LeadMe Program is our professional development and leadership mentoring program. The purpose of the program is to foster and increase the number of emerging leaders to serve NCURA and our profession. Members who are accepted into the program as Mentees are each paired with a Mentor, who supports the Mentee in identifying leadership and professional development goals and objectives, as well as to formulate their Leadership and Professional Development (L&PD) Plan. The leadership plan, which typically aligns with some situation or issue that the Mentee, under the Program, can come up with a plan to improve, streamline, and/or optimize at their home institution. This is the first of 2 sessions where LeadMe graduates present their leadership projects with a short Q&A session immediately following for each.

Afternoon Refreshment Break 2:45pm - 3:00pm

Sessions 3:00pm - 4:30pm

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 6	Update	NSF Update	Basic/Overview	Concurrent	Jeremy Leffler		This session will provide a timely update on the implementation of the revised NSF Proposal and Award Policies and Procedures Guide (PAPPG) (NSF 23-1), as well as information about the January 2023 transition from FastLane to Research.gov for proposal preparation and submission.
Arizona 12	Department/PUI	Yours, Mine, and Ours: A Case Study on the Sharing of Administrative Duties Over the Lifetime of a Funded Clinical Study	Intermediate	Concurrent	Pamela Alvarez, University of Colorado Anschutz Medical Campus	Greta Devol, University of Colorado Anschutz Medical Campus Jillian Ellermann, University of Colorado Anschutz Medical Campus	The Administrative Research Core (ARC) Team supports the research of the Department of Obstetrics and Gynecology in all areas of grant management and regulatory compliance of basic and clinical research. This session will illustrate the sharing of administrative duties presented throughout the lifecycle of a funded clinical study from pre-award to the closeout stage through the lens of a diverse team. Attendees will evaluate the challenges posed by a multilevel project with intersecting tasks across administrative fields, while also recognizing the benefits of a united, central team as opposed to a strictly siloed approach.
Arizona 10	How-To	How to: ARPA-E and DARPA Budget Templates	Intermediate	How-To	Joelina Peck, CRA, Arizona State University	Erin-Kae Rice, CRA, Washington State University	1. General process description (first hour): Working with complex budget templates and accompanying requirements 2. Tips and Best Practices (last half hour)
Arizona 11	Contracting	How to Treat the T&C with TLC at the Department Level	Beginner	Concurrent	Ashley Stahle, Colorado State University	Lisa Allen, Arizona State University	This session will cover best practice to disseminate the Terms and Conditions (TOC) to research admins, principal investigators and other project personnel so that compliance is maintained during the span of the sponsored project. Tips on how to manage the awards will also be covered.
Arizona 4	PreAward	Proposal Solicitation Spell Book: Sometimes, the Scariest Monsters are the Ones You Create. Frightful Pitfalls and How to Avoid Them	Beginner	Discussion	Jennifer Scerri, Stanford University	Erin Kinne, Stanford University	In this discussion group, we plan to run through a few solicitations and have an interactive discussion with participants about breaking down a program announcement and discussing what to look out for to have a successful proposal submission. We will touch on topics from due dates and PI eligibility to considerations that require extra attention like citizenship disclosure or restriction and indirect cost restrictions. Learning Objectives: The goal of this discussion group is to support department research administrators in familiarizing themselves with the components of a solicitation and developing an eye for requirements that could slow or stop a proposal so they can address these issues with the PI and institutional officer early in the proposal process.
Arizona 7	LeadMe	LeadMe Graduate Presentations: Group 2	All levels	Concurrent	LeadMe Graduates: Group 2		The LeadMe Program is our professional development and leadership mentoring program. The purpose of the program is to foster and increase the number of emerging leaders to serve NCURA and our profession. Members who are accepted into the program as Mentees are each paired with a Mentor, who supports the Mentee in identifying leadership and professional development goals and objectives, as well as to formulate their Leadership and Professional Development (L&PD) Plan. The leadership plan, which typically aligns with some situation or issue that the Mentee, under the Program, can come up with a plan to improve, streamline, and/or optimize at their home institution. This is the second of 2 sessions where LeadMe graduates present their leadership projects with a short Q&A session immediately following for each.

Welcome Reception 5:00pm - 6:30pm

Room	Description
Arizona Foyer	Come meet fellow attendees and kick off the meeting with snacks and beverages! Costume Contest & Kids Parade; Happy Halloween!

Dinner Groups (6:00pm-enjoy Tucson) - Sign-up to have dinner with your colleagues!	
Location	**Restaurant**
Offsite-Shuttle Available	El Charro Café(Birthplace of the chimichanga): Established in 1922 by our beloved Tia Monica Flin, El Charro Café of Tucson, Arizona is The Nation's Oldest Mexican Restaurant in continuous operation by the same family. Featuring Sonoran and innovative Tucson-style Mexican food.
Offsite-Shuttle Available	HUB Restaurant & Ice Creamery: Homemade ice cream & New American fare. Located on Historic Congress Street in Downtown Tucson, HUB is right in the middle of the heart of Tucson's Fastest-growing and most exciting area.
Offsite-Shuttle Available	Hotel Congress Cup Cafe: Hotel Congress is a historic hotel featuring Cup Cafe, bars, nightclub, music venue, and events venue in the heart of downtown Tucson, Arizona. The Hotel Congress, built in 1919, is the cultural landmark that anchors Downtown Tucson.
Offsite-Shuttle Available	Daisy Mae's Steak House: Rustic, Southwestern-style restaurant offering mesquite-fired steak, baby back ribs & more.
Offsite-Shuttle Available	Cruda Marisco & Oyster Bar: Casual seafood restaurant that blends seafood with Mexican flavors and flares.

Tuesday, November 1, 2022 - HYBRID DAY
Registration Desk Open 7:30am - 5pm
Yoga: 6:30am-7:30am (Ania Lawn): Miranda Sheeley (Certified 200-RYT), University of Arizona employee with the College of Engineering, will be leading gentle, all-levels yoga session. "We will find dynamic yoga poses and intentional breathwork to ground our bodies and energize our minds!" Please be prepared with comfortable activewear, water, and your own yoga mat!
Breakfast 7:30am - 9:00am
Sessions 9:00am - 10:00am

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 1	PreAward/ PostAward	Working with the NIH Cradle to Grave	Beginner	**HYBRID:** Concurrent	Garrett Steed, University of Colorado Denver/Anschutz Medical Campus	Trisha Southergill, Colorado State University	Working with the NIH as a DRA or Central Admin, will give you the basics of the NIH and we will walk you through the grants process, and give you an overview of key resources and websites. The program is perfect for someone new to Research Administration, as well as for Research Administrators seeking to expand their knowledge of era commons and the NIH. The curriculum provides an overview of the policies and procedures essential to preparing successful proposals to and managing grant awards from the NIH. Learning Objectives: Understand of the NIH overall structure, culture, and organization. Tips and tricks to developing and submitting NIH proposals. How to communication with the GMS Post-Award administration.
Arizona 11	Contracting	Intellectual Property, Research Administration, and You	Beginner	Concurrent	Zach Gill, Oregon State University	Peter Gudlewski, University of California-Berkeley	The goal of this session is to provide a high-level understanding of intellectual property concepts and the challenges in award negotiation and administration, to give Research Administrators baseline knowledge of how university policies and the central sponsored projects office approach this occasionally challenging topic.
Arizona 12	PreAward	Caution! Managing Frightfully Complex Subcontracts at the Proposal Stage: Spine-Tingling Strategies in Getting the Documents You Need, When You Need Them	Intermediate	Concurrent	Joelina Peck, CRA, Arizona State University	Tiffany Gregory, M.Ed., University of Arizona	Federal opportunities are increasingly expecting principal investigators to collaborate with other universities and industry partners through subcontracting. These subcontracts add a layer of complexity when responding to funding opportunities requiring complex budgets and administrative components. This presentation will focus on strategies in obtaining fully compliant subcontractor documents in a timely and organized fashion resulting in the submission of a responsive proposal to the sponsor. Learning Objectives: Provide guidance to help identify what information is need from subcontractors, share tips for requesting and successfully obtaining this information, share our tips on how to quickly transition when thing don't go as planned, and provide specific examples using two different federal sponsors.

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 10	Human Capital/DEI	Empowering your ghouls and not being a Jerk-O-Lantern - the process of resurrecting, sculpting their newly formed passes into supernatural beings.	Advanced	Concurrent	Jason Park, University of California, Irvine		A leadership role is more than conducting supervisory tasks. A leader has a fundamental role in an employee's career journey and has the opportunity to profoundly shape the career growth and path of the individual. In this session, the difficulties of recruitment, identifying and cultivating the strengths of the individual, challenging them on the areas where they fall short while being a supporting resource will be discussed. The session will also cover mentoring and preparing the individual for the " next step" and to become an effective leader themselves.
Arizona 9	PostAward	Taking the Fright Out of Participant Support Costs	Intermediate	Concurrent	Tricia Callahan, Emory University	Nicole Braman, Portland State University	According to Uniform Guidance (UG), participant support costs are allowable on federal awards with prior sponsor approval. Even so, managing participant support is fraught with confusion, difficulties, and challenges. Join us for 'Taking the Fright Out of Participant Support Costs' where we will cover what constitutes participant support and what restrictions are in place for expending and reallocating participant support costs. Learning Objectives: -List typical participant support costs. -Identify requirements for expending participant support. -Recognize limitations of reallocating participant support costs.

Morning Refreshment Break 10:00am - 10:30am

Sessions 10:30am - 11:50am

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 1	How-To	Building Better Budgets: How to leverage Excel efficiently	Beginner	**HYBRID:** How-To	Tracy Gatlin, University of Montana	Marguerite Klumb, UC Irvine	Harness the power of Excel! In this session, learn how to utilize tools within Microsoft Excel beneficial to grant budgeting. Increase your awareness of how to create efficient budget templates and include formulas for auto-calculation of indirect costs, fringe benefits, etc. We will provide user tips and shortcuts, discuss common budgeting scenarios, and provide an overview of other tools available.
Arizona 5	PostAward	Thinking locally, working globally: Pre-award planning for post-award success	Advanced	Discussion	Theresa Caban, Retina-Vitreous Associates Medical Group		Federally funded global sponsored projects present a unique opportunity to engage in work beyond the US that can have a significant impact. But working globally can present operational challenges when executing a project. Many of these challenges, like tax concerns, country registration, and foreign workers are not always considered or known about during the pre-award stage. Considering the post-award implications of these challenges during the pre-award stage can help lead to a quicker project start-up. We will walk through different stages of proposal planning to discuss how certain considerations can set the award up for success. We will also share some lessons learned from our experience in both pre and post-award stages of global sponsored projects. Learning Objectives: 1. Identify special considerations for global sponsored projects 2. Identify trouble spots for global sponsored projects that should be discussed during proposal development
Arizona 11	Department/ PUI	It's Not Frankenstein, It's Clinical Research (an Introduction)	Beginner	Concurrent	Jennifer Cory, Stanford University	Maricelly Vargas, City of Hope Niraj Raman, Stanford University	This session will provide an overview of clinical research: the stages of research, the roles of the various people involved and best practices for effectively working together. We will review budget factors, compliance issues, and contracting components. Key regulations that guide researchers/institutions will also be discussed.
Arizona 10	Human Capital/DEI	Ghouls Just Wanna Have Fun: Research Administration Jeopardy	Intermediate	Concurrent	Kari Vandergust, Stanford University	Carrie Chesbro, Stanford University Megan Dietrich, Stanford University	Do you think you know a lot about research administration? Have you ever wanted to be on a game show? This is the session for you! Come test your knowledge of the research administration field with this fun, interactive game show! Categories include effort, cost share, acronyms, allowability, and many others. Come for the knowledge, stay for the prizes!
Arizona 12	Human Capital/DEI	Research Partnerships with Tribal Colleges and Universities – Exploring Collaborations with Diné College	Beginner	Discussion	Andrea Christelle, Diné College	Janet Benally, Diné College	In 1968 Navajo Community College was as the first tribally-controlled college in the world. In 2019 it was renamed Diné College and began offering four-year degrees. The institution is now offering advanced degrees and prioritizing support for faculty and key staff to pursue a research agenda. At the same time, Diné College is seeking strategic collaborators who are open to research conducted using Diné methodologies and epistemologies. This facilitated dialog will explore how to support research partnerships that honor and benefit from Indigenous modes of conducting research and creating knowledge while staying in compliance and satisfying conventional requirements.

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 9	Contracting	Best Practices in Negotiating Research Agreements	Beginner	Concurrent	Claire Freund, University of Idaho	Matt Smith, Boise State University	During this session, we will provide agreement negotiators with a toolbox of ideas to learn, build their reputations, and simplify, expedite, and continuously improve agreement drafting and negotiations. The primary focus will be incoming sponsored agreements, but we will also briefly address analogous issues in subawards/subcontracts and contractor/vendor agreements. Many ideas can be implemented immediately, while others may require close coordination with other internal offices, including general counsel, compliance, information technology, and/or procurement. Learning Objectives: Provide agreement negotiators with a toolbox of ideas to learn, build their reputations and simplify, expedite and continuously improve agreement drafting and negotiations.

Lunch: 12:00pm - 1:00pm		
Room	Description	
Arizona 6/7	Full Joint Lunch for all Meeting Attendees	

Sessions 1:15pm - 2:15pm							
Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 1	Human Capital/DEI	DEI session: Integrating Diversity and The Culture of Inclusion in Engineering Research Projects	Advanced	**HYBRID:** Concurrent	Dr. Kathleen Melde, University of Arizona	Dr. Noel Hennessey, University of Arizona	In this session, we will discuss some of our strategies to integrate DEI into engineering research projects. We will discuss our experience with working with large teams and feedback from funding agencies. We plan to present recent work focusing on the sense of belonging with first- and second-year engineering students from historically under represented groups. We will share success stories featuring effective strategies to integrate first- and second-year engineering students in faculty research. Our goals of creating pathways to build out a technical workforce that includes students from diverse backgrounds will be discussed. Finally, we will present our approaches in developing allies from within the faculty Our objective is to build capacity and a sense of ownership among faculty investigators to provide more opportunities for student engagement at an early academic level.
Arizona 9	Compliance	NSF HERD Survey	Intermediate	Concurrent	Leslie Rodelander, Cal Poly Humboldt		Overview of what the NSF HERD Survey is, what the information captured is used for and how participation is important to your institution; discussion of data capture and methods of preparation; and, access to NSF HERD Survey data and ways to put it to use at your institution.
Arizona 5	PreAward	Pre-Award Onboarding: From Ghastly to Great	Beginner	Discussion	Tricia Callahan, Emory University	Lael Gray, Washington State University	In a survey by Gallup, only 12% responded that their employer did a great job of on-boarding new hires. Research shows that a majority of organizations focus on paperwork rather than on people and performance, leading to job dissatisfaction from the outset. Join us as we share ideas and resources for developing a pre-award on-boarding toolkit that's sure to move your onboarding from ghastly to great.
Arizona 12	PostAward	Differentiating between Cost Sharing Types - Mandatory vs. Voluntary Committed/Uncommitted Cost Sharing	Beginner	Concurrent	Amanda He, City of Hope	Winnie Fong, Caltech	Cost sharing can be challenging and confusing, especially with regard to identifying the funding sources to cover cost sharing and tracking cost sharing commitments. Most universities discourage unnecessary and unsupported voluntary cost sharing. Research administrators should have a deep understanding of cost sharing to help Principal Investigators understand sponsor requirements and institutional policy, as well as help them develop proposal budgets that adhere to these policies. This session will outline the different types of cost sharing and the implications on proposal submission and post-award management processes. The session will provide real-life scenarios, and address the challenges during the various stages of a sponsored project. Learning Objectives: During this session, participants will: 1. Learn the differences between and understand the implications of cost sharing types. 2. Consider how the cost share commitment and budget at the proposal submission stage has implications for the post award management of the award. 3. Identify best practices and strategies for tracking cost sharing throughout the life of the award.

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 11	How-To	Successfully Managing Dr. Dracula's Internationally-based Transylvania Research Project	Intermediate	Concurrent	Matt Michener, Washington State University	Erin-Kae Rice, CRA, Washington State University Casey St.Clair, University of Washington Tim Mhyre, University of Washington Zach Gill – Oregon State University	We will focus on a handful of the more difficult items to navigate with international research administration and end with a discussion on what our institutes have experienced with large international award/contract. -Tribal Nations (relationship building/management). - Discussion on Executive Order 13175 of November 6, 2000. Consultation and Coordination with Indian Tribal Governments. - WSU Executive Order 41: Policy on Tribal Engagement, Consultation, and Consent for Joint WSU-Tribal Research Activities and Projects. - Non-government Organizations (NGO). - What is and NGO and when is it needed? - What are the steps to put an NGO in place? - Pre-award agreement/award review and hand-off to post-award. - Currency conversions. - Governing law. - Differing communication languages. - Current projects at UW and WSU as examples and the unique situations. - $125 million USAID and WSU cooperative agreement.
Arizona 10	Human Capital/DEI	Toil and Trouble: Remote Teams Aren't That Scary!	Beginner	Concurrent	Trisha Southergill, Colorado State University	Kelly Bergeron, Colorado State University	Remote hiring is here to stay! Learn effective remote onboarding, remote team building, and remote working from a fully remote research administration team. Learning Objectives: 1. Learn the parameters and culture of remote work and remote teams. 2. How to establish remote working rerlationships. 3. Discuss strategies for successful remote work
Arizona 4	Compliance	Brewing a Potion for Compliance: How to Talk to Stakeholders about Award Requirements	Beginner	Discussion	Betty Rasmussen, University of Colorado Boulder	Ashley Stahle, Colorado State University	This is an interactive session that provides tools for getting your point across (ideas from both presenter(s) and solicited from the audience), Participants will share and discuss solutions to various situations. There may be an opportunity for participants to address a fun theoretical requirement. This session is meant to be fun, engaging, and provide practical practice. Learning Objectives: • Organize your thoughts to support your points • Learn how to address objections and questions • Practice what you've learned

Sessions 2:30pm - 3:30pm							

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 1	Department/ PUI	Can we Buy This? Navigating the Demons of Cost Allowability	Beginner	**HYBRID:** Concurrent	Jennifer Lawrence, University of Arizona	Tara Gonzales, University of Arizona Niraj Raman, Stanford University	Many factors are in play when determining allowability of costs. Cost principles, terms and conditions and the obscure "reasonableness" test all contribute to the decision of whether costs are allowable or unallowable. We will discuss these factors and also touch on methods for consistently allocating costs across projects. We will provide insights into using routine reporting and data to navigate crucial conversations with PIs. We will share best practices, resources, tools and techniques to help you develop a standard approach to allowability determinations.
Arizona 12	Compliance	To Crypt or Not to Crypt: Managing Data	Advanced	Concurrent	Garrett Steed, University of Colorado Denver/Anschutz Medical Campus	Alexa Van Dalsem, University of Colorado Boulder	In August 2022, the Office of Science and Technology Policy released a press release about OSTP's Ensuring Free, Immediate, and Equitable Access to Federally Funded Research memo. The press release stated, "The U.S. is committed to the ideas that openness in science is fundamental, security is essential, and freedom and integrity are crucial," a quote pulled from Dr. Alondra Nelson's remarks delivered to the G7 Science Ministerial in June 2022. What does this mean for research institutions? What do we need to know to balance security and sharing in data? This session will review the current landscape of data security and sharing, including controlled unclassified information (CUI), NIH Data Sharing and Management Policy, and future trends related to the CHIPS Act and OSTP's memo on "Ensuring Free, Immediate, and Equitable Access to Federally Funded Research." Learning Objectives: • Exposure to terms and conditions (DFARs Clauses) as well as actions (SPRS, Exostar, and training) relevant to awards with Controlled Unclassified Information • Understanding of current and upcoming federal agency data sharing requirements and actions needed for compliance • Recognize the balance of data security and sharing and related challenges

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 5	How-To	DEI Discussion Session	Intermediate	Discussion	Lisa Wottrich, CRA, SRI International (MODERATOR)		Encouraging DEI in STEM - Follow on to "Integrating Diversity and the Culture of Inclusion in Engineering Research Projects"
Arizona 11	PreAward	Fang-tastic ideas for Funding Opportunities for Investigators	Intermediate	Concurrent	Elizabeth Gallagher DMA, Saint Mary's College of California		This session will provide an overview of research funding opportunity support at a large academic medical center and a small, primarily undergraduate institution. We will provide specific examples of funding opportunity messages as well as strategies employed to support our investigators. We will also discuss fundamental rules and guidelines related to funding success across multiple types of institutions and funding opportunities. Learning Objectives: • Learners will be able to identify strategies to support investigators in selecting opportunities and submitting funding applications • Learners will be able to identify skills for managing investigators' expectations and developing successful partnerships with investigators
Arizona 9	Human Capital/DEI	Stories from the Morgue: Bringing LIfe Back to the RA Staffing Pipeline	Beginner	Concurrent	Sylvia Bradshaw, Southern Utah University	Lawrence Mbaki, Southern Utah University Carson Brown, Southern Utah University Katie Freeman, Southern Utah University	Staffing challenges seem to dominate conversations during this new "great resignation era". Join us as we discuss ways to turn this unique resource challenged environment into an opportunity to recruit top talent to research administration through innovative student involvement and campus engagement. Learning Objectives: This session will provide perspective from three student professionals that are integral to research administration on the SUU campus. We will discuss innovative ways to fully engage young professionals in meaningful work that inspires the research administration career path. Participants will be encouraged to share their own success stories, contributing to the revival of the RA pipeline.
Arizona 4	Human Capital/DEI	Regional Round-up	All	Discussion	Kathryn O'Hayre, Colorado State University	Trisha Southergill, Colorado State University Joelina Peck, CRA, Arizona State University Eric Everett, University of Idaho	All RM participants welcome! Roundups are a reoccurring regional networking event from the Reg. VII PEDC, hosting small group discussions simultaneously for social, business, professional development, and networking topics that participants can move between. Reg. 6&7 Professional Development Committees are joining together for the RM in-person session, hosting table topics on: "Presenter Collab - prep your next big idea", "New Member Networking", "CRA Cram Session" and "Social Trivia and Ice-Breakers". Visit the Welcome table to share future ideas, feedback, or learn how to get involved with your Committee volunteers!
Arizona 10	Contracting	The Chills and Thrills of Material Transfer Agreements	Beginner	Concurrent	Kate Stansfield, University of Colorado	Kendall Crosby, Georgia Institute of Technology	This session will cover the good, the bad, and the ugly of Material Transfer Agreements (MTAs). We'll discuss types of materials that are transferred, and the importance of MTAs for University researchers. We'll cover Industry vs. UBMTA vs. Academic/Non-Profit MTAs and how these different types fall into the least and most complex work that we do. We'll discuss strategies for gaining the information you need to complete an MTA, and what can happen if important information is missing. Kate and Kendall will review the anatomy of a basic MTA and discuss some of the complicating factors that they have experienced working with these agreements.

Afternoon Refreshment Break 3:30pm - 4:00pm

Sessions 4:00pm - 5:00pm

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 1	How-To	NCURA Paths for Growth	Beginner	**HYBRID:** Discussion	Lisa Wottrich, CRA, SRI International (MODERATOR)	R6 & R7 officers and volunteers, past and present	How to: helping members identify paths to joining NCURA leadership. A "social" function will follow to allow attendees to chat with regional officers/volunteers from both VI/VII, past and present.
Arizona 4	PostAward	Best Practices for PI Transfers	Intermediate	Discussion	Jessica Kim, The Lundquist Institute	Vicki Krell, Arizona State University Nicole Braman, Portland State University	Addressing challenges on Incoming or Outgoing PIs (awards pending, staying, transferring, or closing, subawards, equipment transfers, budget revisions, staffing, compliance protocols such as IRB, IACUC, CTAs).

Location	Track	Title	Level	Type	Presenter 1	Presenter 2	Description
Arizona 12	Contracting	Working Together to Build a Lasting Subaward with a Solid Foundation	Intermediate	Concurrent	Elaine Jun, The Lundquist Institute	Ariana (Evensen) Abrahamsen, Washington State University	This session will cover best practices for development of outgoing subawards. From proposal, award issuance, subrecipient monitoring and closeout, there are opportunities for things to fall through the cracks at each stage. We may understand that there are best practices for administering awards, but how do we implement them at our institutions? To help optimize your outgoing subawards process, we'll discuss the importance of building a useful subaward agreement by considering needs for administration, effectively collaborating with key players involved, and offering tips and tricks to set you up for success.
Arizona 11	PostAward	Centralization of pre and post award: the journey of building a cohesive and collaborative research administration team	Intermediate	Concurrent	Megan Vu, UC Irvine	Joyce Penh, UC Irvine	As a centralized unit, the research administration team cultivates a positive working environment while establishing centralized processes for both Pre and Post award operations. In this presentation, the presenters will share their own experiences leading these efforts and discuss the barriers encountered while keeping the focus on the team's mission to serve the School's faculty by streamlining services and improving operations, supporting each other on complex and challenging tasks, and fostering professional growth. Learning Objectives: 1. Participants will learn how to support team members. 2. Participants will be able to understand the roles and responsibilities of a centralized pre and post award unit. 3. Participants will learn about best practices to build a centralized pre and post award team. 4. Participants will gain an understanding of the benefits of a centralized contracts and grants team structure
Arizona 10	Compliance	Overview of Research Terms and Conditions	Beginner	Concurrent	Beata Najman, University of California, Irvine	Tracy Gatlin, University of Montana	Agency implementation statements of the Uniform Guidance go hand-in-hand with the updates to the Research Terms and Conditions (RTCs). This session will help attendees get a better understanding of how various agencies adapted Uniform Guidance by providing an overview of the Research Terms and Conditions as they have been detailed in the Appendix A: Prior Approval Matrix, and by highlighting important differences in how RTCs have been applied by various Federal sponsors. Management of the Federal grants has been greatly simplified by the implementation of the Uniform Guidance and by the common rules reflected in the Research Terms and Conditions. However, implementation of these improvements and simplifications by the Federal Agencies has not been identical, and often these discrepancies create confusion. Appendix A: Prior Approval Matrix will be discussed during this session to help ensure compliance and effective management of the Federal awards. This session is recommended for financial and departmental research administrators. Learning Objectives: • Describe Research Terms and Conditions (RTCs) and their role in administering research awards • Summarize how participating agencies have been implementing RTCs • Discuss requirements for obtaining prior approvals
Arizona 9	PreAward	The Spooktacular Side of the Shared Service Model	Intermediate	Concurrent	Sara Rotz, MPA, CRA, University of Colorado Anschutz Medical Campus		Join us in a discussion of the implementation of a pre-award shared service model, the importance of relationships with key stakeholders, and lessons learned along the way. The focus will be on the current climate faced by research administrators with increased administrative burden and diminishing resources - including staffing challenges. Learning Objectives: More consistent and high-level service potential, Current challenges & Relationship building

Tuesday Evening Reception 6:00pm - 9:30pm	
Location	Description
Arizona Ballroom	Come enjoy some local cuisine and entertainment. Lead Me graduation will be held. Performance by Mariachi Pueblo Viejo and Ballet Folklorico Tapatio from 6:30-7:30pm. Guest Passes available for $65.

Wednesday, November 2, 2022

Registration Desk Open 7:30am - 9:00am

Continental Breakfast 8:00am - 9:00am

Sessions 9:00am - 10:30am

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 5	Human Capital/DEI	Not every witch lives in Salem: Double, double toil and trouble; hire, churn and remote work struggle	Intermediate	Discussion	Jenny Gallaher, University of California-San Francisco	Matthew Michener, Washington State University	A discussion group on how to effectively hire, onboard and successful integrate a remote workforce.
Arizona 12	PreAward	NSPM-33 of the Living DPI	Beginner	Concurrent	Lori Ann Schultz, University of Arizona		Research administrators can ready their institution to use the most widely available DPI for individuals: Open Researcher and Contributor ID (orcid.org) as it becomes a common requirement in research management systems, and is referenced as a solution for the recent OSTP Guidance on NSPM-33. ORCID iDs are unique identifiers for researchers - their ID is their digital name and their ORCID record is a hub storing connections to their activities. The presentation will demonstrate ORCID use by funders and research institutions and discuss how ORCID use can help comply with research security requirements, including timely updates to NSPM-33 guidance and agency requirements. Learning Objectives: Participants will understand what a DPI is, and isn't. Participants will be able to define an ORCID and understand how information in populated and shared in an ORCID record. Participants will understand how the OSTP NSPM-33 guidance and ORCID intersect.
Arizona 11	Contracting	Spooky Business: Managing SBIR/STTR Projects	Intermediate	Concurrent	Cara Winnewisser, UC Santa Barbara	Frosina Al Zgoul, City of Hope	This session will cover various aspects of SBIR/STTR projects, particularly from a contract perspective. Participants should have at least a basic familiarity with the SBIR/STTR mechanism.
Arizona 10	Department/PUI	Mixing Potions for Good not Evil: Cultivating Successful PI-Administrator Partnerships	Intermediate	Concurrent	Jennifer Cory, Stanford University	Csilla Csaplar, Stanford University Elizabeth Gallagher, Saint Mary's College of California	Ever feel like you've been branded as "red tape" because your work is associated with policies and regulations? Building a strong relationship with your PI—one in which you are established as a teammate instead of a barrier—can improve your research administration outcomes and better equip you to navigate challenges together. This session aims to 1) identify common obstacles in building strong PI-administrator relationships, 2) explore strategies for successful partnerships (including the impact of effective communication, positive psychology, resourcefulness, and advocacy), and 3) draw upon case studies from real life scenarios to engage in an interactive, solution-driven discussion.
Arizona 9	PostAward	Cost Transfers and Pterodactyls	Intermediate	Concurrent	Carrie Chesbro, Stanford University	Kari Vandergust, Stanford University Megan Dietrich, Stanford University	Do you struggle with cost transfers? Do you like dinosaurs? If so, then this is the session for you! While cost transfers are a necessary tool in research administration, things can get complicated. Some transactions are cost transfers (Stegosaurus), but some are not (Pteranodons). Some transactions are lower risk (brontosaurus) and some are higher risk (velociraptor). In this session, we'll discuss all types of transfers, how to avoid run-ins with T-Rex (audit-provoking transactions), and best practices to maintain harmony in our dinosaur park. If this is your second visit to our dino park, watch out for new safety measures we've implemented to ensure a smooth ride through the park! Learning Objectives: 1. How to identify which transactions are truly cost transfers and which ones are not. 2. About potential issues and audit risks stemming from cost transfers. 3. Best practices for cost transfer processing and documentation.

Morning Refreshment Break 10:30am - 11:00am

Sessions 11:00am - 12:00pm

Room	Track	Title	Level	Session Type	Lead Presenter	Co-Presenter(s)	Description
Arizona 10	PreAward	A Nightmare on Spreadsheet: Surviving the Pre-award Budgeting Process	Beginner	Concurrent	Mikayla Madjidi, Arizona State University	Howard Bergman, Arizona State University	We will provide an introduction to creating an accurate budget and discuss each of the budget categories. Specifically, we will get more in depth to explain personnel inclusion, travel policies, participant support vs human subjects, other costs, and "hidden" expenses such as fringe benefits and indirect costs. An RFP will be reviewed for budget instructions; unique requirements and cost-share (matching) will also be included. The importance of a clear justification will be discussed. Learning Objectives: To present basic budgeting categories and strategies to allow a thorough understanding of considerations to create a budget for sponsored projects proposals.
Arizona 11	PostAward	Post-Award Monster Mash	Beginner	Concurrent	Kathyrn O'Hayre, Colorado State University	Siobhan McDonald, Portland State University Jennifer Lawrence, University of Arizona	It's alive! The award arrived - don't get spooked by the post award lifecycle. In this interactive session we cover everything you need to know from award announcement to closeouts. We cover classics from managing your budget to reporting, prior approvals, and eventual closeout. We share some tools and strategies to take the terror out of errors and build confidence in your award management.
Arizona 12	Compliance	Research Compliance Overview – (IRB, IACUC, IBC); Hypothetically speaking….what could possibly go wrong?	Beginner	Concurrent	Sandy Sward, Montana State University		Are you looking for a deeper understanding of the world of Compliance? This workshop will provide a thorough dive into the three primary areas of the compliance landscape: Institutional Review Board (IRB), Institutional Animal Care and Use Committee (IACUC), and Institutional Biosafety Committee (IBC). The interactive session will include a discussion of some hypothetical protocol scenarios to facilitate a better understanding of the regulations governing these three areas. Come prepared for lively discussion and sharing among your colleagues. Learning Objectives: • Participants will be able to identify how the areas intersect with Research administration and the research enterprise; • Participants will gain an understanding of common research compliance issues; and • Participants will be able to identify project activities that may require a compliance review.
Arizona 5	Department/ PUI	The Ghostly Budget: Conquering your Fears	Beginner	Discussion	Alicia Middleton, Stanford University	Tiffine Vang, Stanford University	Have you had any experiences with difficult budgets? We will share tips and invite you to share your tips. We will be discussing the following: Getting Started •Review the Key Terms •Determine: Allocable, Reasonable, Allowable •Specific Sponsor Rules: Federal, State, and Private, and Department and School or College Specific Rules Plan/Outline the Budget •Review the Sponsor Guidelines •Determine the Project Period •Discuss the Budget with the Principal Investigator •Use Current Templates and Rates: F&A, TGP
Arizona 9	Human Capital/DEI	A Spooktacular Path: Career and Professional Development for Research Administrators	Intermediate	Concurrent	Megan Vu, UC Irvine	Marcel Villalobos, University of Arizona	As team leaders in research administration, we aim to provide opportunities for career and professional development to our staff. This session focuses on the various opportunities that research administrators can explore to further develop their expertise and skills, and to advance their careers. In addition, the presenters will share their individual experiences with leading a pre-award and post-award team in their respective School/College and central campus levels. Learning Objectives: 1. Participants will learn about opportunities for career and professional development for team members. 2. Participants will be able to understand the structure, roles and responsibilities of a centralized pre and post award team, and campus post award unit. 3. Participants will learn about best practices to build and lead a research administration team at the College/School and campus levels.
Meeting Adjourns at Noon							