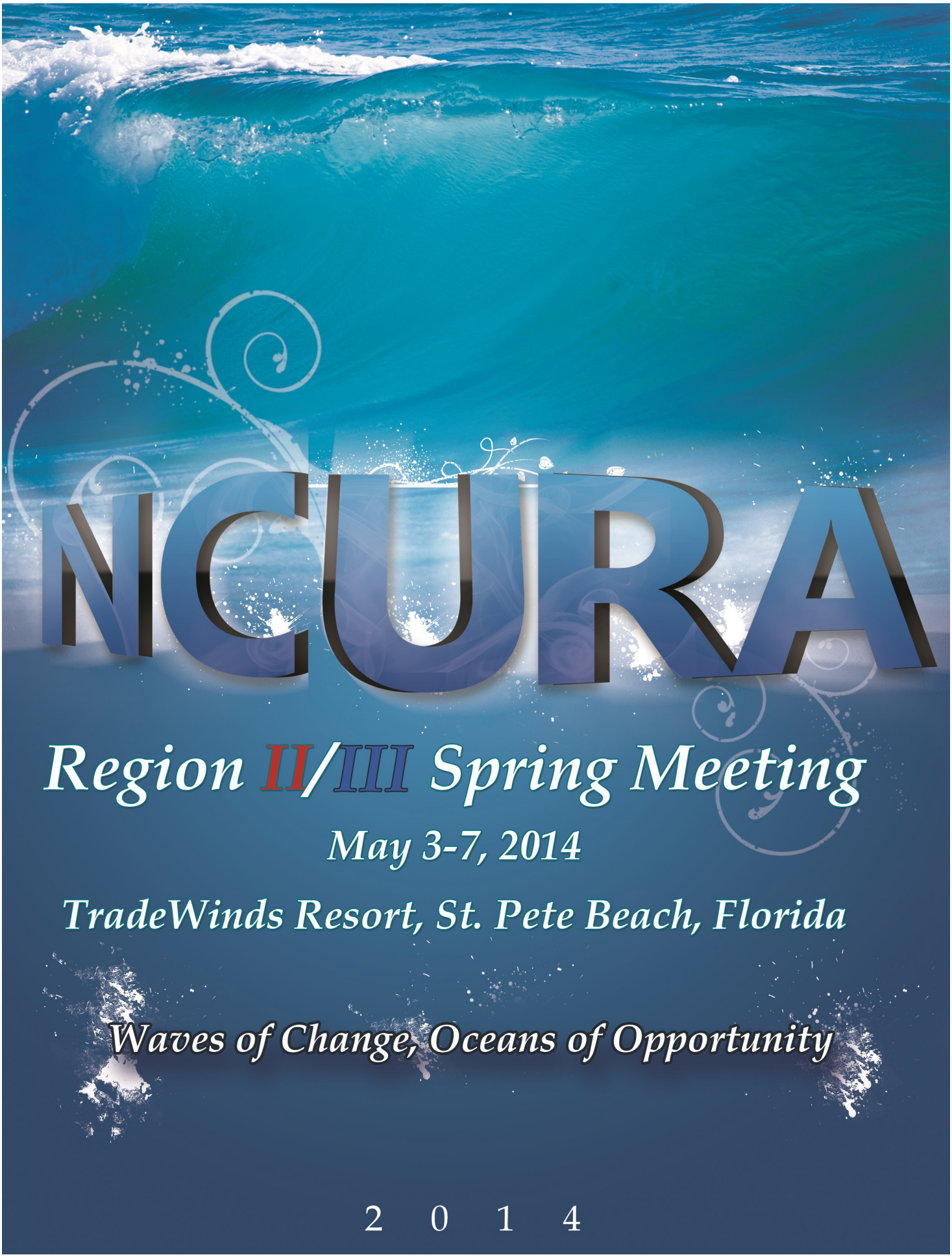

NCURA
Region II/III Spring Meeting
May 3-7, 2014
TradeWinds Resort, St. Pete Beach, Florida
Waves of Change, Oceans of Opportunity
2014

How will your college or university keep pace and scale for increased research volume, complexity, and diversity?

rSMART RESEARCH & GRANT MANAGEMENT SUITE

Learn how our cloud-based electronic research administration solutions can help you:

- Streamline sponsored program management
- Simplify research compliance management
- Maximize research and grant funding
- Improve research & grant oversight and visibility

Get Your Free Copy of the Report

rsmart.com/research-trends

rSmart, a leader in enterprise resource planning (ERP) software for higher education, empowers colleges and universities to embrace community-driven, open source Kuali ERP software. Our customers significantly reduce research, financial, and student administration costs. Learn more at www.rsmart.com.

rSmart®

Table of Contents

Welcome from our Regions' Chairs	5
Schedule at a Glance	6
Keynote Address	8
Meeting Information	9
Workshops	10
Monday Concurrent Sessions & Discussion Groups	12
Tuesday Concurrent Sessions & Discussion Groups	15
Wednesday Concurrent Sessions & Discussion Groups	19
Things to Do	21
Networking Events & Activities	22
2014 NCURA Regional Leadership	23
TradeWinds Island Resort Property Map	24
TradeWinds Island Resort Floorplan	25
Thank You	26
Exhibitors & Sponsors	27

Concurrent Session Handouts Available Online:

http://ncura2014.digitalunited.net/program/

"Our 2900 registrants are saying, 'Don't print the agenda. Just give me the Guidebook.'"

– Dr. Tracy Robey runs the Renaissance Society of America's annual meeting. Next year RSA will save $30,000 on printing by going mobile.

Why take your events mobile?

- **Straightforward.** You don't need to hire a specialty software developer to build your apps and your team doesn't need help to add and manage content. The backend interface is friendly and intuitive.
- **Supported.** Guidebook's award-winning support team is on hand for questions. You can even hire a Guide Builder or an on-site event support tech.
- **Affordable.** Guidebook offers custom solutions for every budget, from guides for team trainings to branded applications for conferences or entire campuses.

More academic institutions partner with Guidebook than anyone else.

You can build a mobile guide for anything! It's free to get started and only takes a few minutes. Reach out to Alex to learn more:

Alex Goldberg
Marketing Associate
650.319.7233 x505
agoldberg@guidebook.com

guidebook
guidebook.com

WELCOME
from our Regions' Chairs

Welcome to St. Pete Beach, to the TradeWinds Island Grand Resort, and to the Region II and III Joint 2014 Spring Meeting. Whether the weather has brought us warm temperatures or spring showers, we are confident it is a significant improvement over the winter most of us have endured. We hope you remembered to pack your flip-flops!

As you listen to the gulf waves lapping the shores of the West Coast of Florida, think of the waves of change affecting research administration today. Be it change in circulars or in financial compliance; change is a constant. Use the 2014 Joint Spring Meeting sessions to strengthen what you know and learn something new. Engage speakers and your colleagues in meaningful dialogue to also impart some of your own unique knowledge and experience.

We also encourage you to make the most of the networking opportunities at the 2014 Joint Spring Meeting by volunteering on site, attending your Region's business meeting, and signing up for dinner groups. NCURA is a membership organization, and your involvement makes it stronger!

We truly hope you gain knowledge from the program we have developed for the 2014 Joint Spring Meeting, and return to your institutions as stronger Research Administrators, ready to take on the waves of change.

If you can also leave with some sand between your toes…all the better!

Leerin Shields, University of Maryland, Baltimore

Chair, NCURA Region II

Rodney Granec, The University of West Alabama

Chair, NCURA Region III

SCHEDULE AT A GLANCE

Date	Event	Location
SATURDAY, MAY 3		
7:30 AM - 8:30 AM	Workshop Registration	Meeting Check-in (Main Lobby)
8:30 AM - 4:30 PM	**Full-Day Workshops**	*See Page 10*
10:15 AM- 10:30 AM	Workshop Break	Jacaranda Hall Foyer
Noon - 1:30 PM	Workshop Luncheon	Banyan Breezeway
2:45 PM - 3:00 PM	Workshop Break	Jacaranda Hall Foyer
SUNDAY, MAY 4		
7:30 AM - 5:00 PM	Registration Open	Meeting Check-in (Main Lobby)
8:30 AM - 4:30 PM	**Full-Day Workshops**	*See Page 11*
8:30 AM - 12:00 PM	**Half-Day Morning Workshops**	*See Page 11*
10:15 AM - 10:30 AM	Workshop Morning Break	Jacaranda Hall Foyer
Noon - 1:30 PM	Workshop Luncheon	*Banyan Breezeway*
1:30 PM - 4:30 PM	**Half-Day Afternoon Workshops**	*See Page 11*
2:45 PM - 3:00 PM	Workshop Afternoon Break	Jacaranda Hall Foyer
5:30 PM - 6:00 PM	Newcomer Reception	Breck Deck North
6:00 PM - 7:00 PM	Spring Meeting Welcome Reception	Breck Deck North
8:00 PM - Midnight	Hospitality Suite	Snowy Egret
MONDAY, MAY 5		
7:30 AM - 4:30 PM	Registration Open	Meeting Check-in (Main Lobby)
7:30 AM - 8:30 AM	Continental Breakfast	Banyan Breezeway
8:45 AM - 9:00 AM	**Conference Welcome**	*Tarpon / Sawyer / Long Theater*
9:00 AM - 10:30 AM	**Keynote Address - Kevin Carroll (Hanger Prosthetics)**	*Tarpon / Sawyer / Long Theater*
10:30 AM - 10:45 AM	Morning Break with Exhibitors	Banyan Breezeway
10:45 AM - Noon	**Concurrent Sessions & Discussion Groups**	*See Page 12*
Noon - 1:30 PM	Lunch	Banyan Breezeway
1:30 PM - 2:45 PM	**Concurrent Sessions & Discussion Groups**	*See Page 13*
2:45 PM - 3:00 PM	Afternoon Break with Exhibitors	Banyan Breezeway
3:00 - 4:15 PM	**Concurrent Sessions & Discussion Groups**	*See Page 14*
8:00 PM - Midnight	Hospitality Suite	Snowy Egret

HOW TO ACCESS **WI-FI** AT TRADEWINDS ISLAND RESORT

IN MEETING ROOMS:
Select the TradeWinds dropdown icon, and enter password: **group5500**.

IN GUEST ROOMS:
Select the TradeWinds dropdown icon, and enter password: **guest5500**.

NOTE THAT YOU MUST LOG OUT AND BACK IN WHEN ACCESSING WIFI BETWEEN MEETING AND GUEST ROOMS

SCHEDULE AT A GLANCE

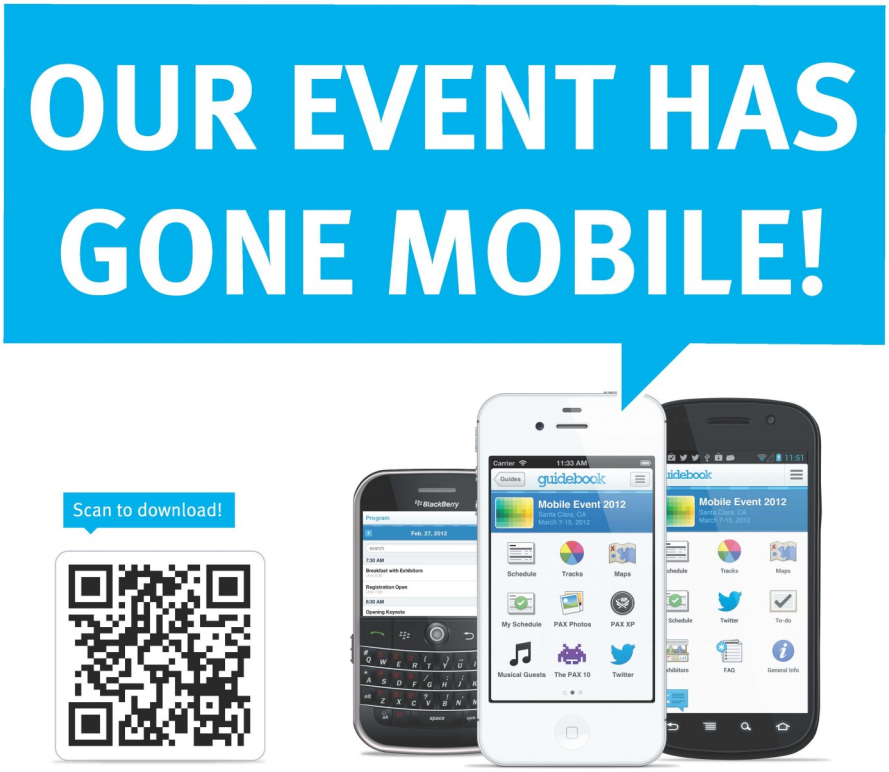
Date	Event	Location
TUESDAY, MAY 6		
7:30 AM - 9:15 AM	Continental Breakfast with Quick Topic Discussions	Banyan Breezeway
9:15 AM - 10:30 AM	**Concurrent Sessions & Discussion Groups**	***See Page 15***
10:30 AM - 10:45 AM	Morning Break with Exhibitors	Banyan Breezeway
10:45 AM - Noon	**Concurrent Sessions & Discussion Groups**	***See Page 16***
Noon - 1:30 PM	Lunch / Regional Business Meetings	*See Page 22*
1:30 PM - 2:45 PM	**Concurrent Sessions & Discussion Groups**	***See Page 17***
2:45 PM - 3:00 PM	Afternoon Break with Exhibitors	Banyan Breezeway
3:00 PM - 4:15 PM	**Concurrent Sessions & Discussion Groups**	***See Page 18***
6:30 PM - 7:00 PM	Pre-Dinner Reception	Breck Deck North/South
7:00 PM - 10:00 PM	Regional Dinner	Breck Deck North/South
10:00 PM - Midnight	Hospitality Suite open	Snowy Egret
WEDNESDAY, MAY 7		
7:30 AM - 8:30 AM	Continental Breakfast	Banyan Breezeway
8:30 AM - 8:45 AM	Morning Break with Exhibitors	Banyan Breezeway
8:45 AM - 10:00 AM	**Concurrent Sessions & Discussion Groups**	***See Page 19***
10:00 AM - 10:15 AM	Break	Jacaranda Hall Foyer
10:15 AM - 11:30 AM	**Concurrent Sessions & Discussion Groups**	***See Page 20***
11:30 AM	Meeting Adjourns	

DOWNLOAD THE GUIDEBOOK APP TO YOUR iPHONE or DROID MOBILE DEVICE AND STAY CONNECTED!

Once you have downloaded the app, search for:

2014 NCURA Region II/III Joint Spring Meeting

Customize your meeting experience by adding sessions to the **My Schedule** feature!



KEYNOTE

Kevin M. Carroll, MS, CP, FAAOP
Vice President of Prosthetics

Hanger CLINIC
Empowering Human Potential

Kevin Carroll, MS, CP, FAAOP is an accomplished healthcare professional with over 30 years as a practicing prosthetist, visionary researcher, and skilled educator. As Vice President of Prosthetics for Hanger Clinic, Carroll travels nationally and internationally presenting scientific symposiums and managing clinics for difficult prosthetic cases. Carroll is the co-developer of the patented Hanger ComfortFlex™ Socket System; a bone and muscle contoured socket that revolutionized socket design and comfort. He has appeared on news broadcasts such as *Dateline, 20/20, CBS Early Show, NBC Nightly News, ABC's Good Morning America*, and the *Discovery Channel*.

When not caring for his human patients (he specializes in the care of older adults and has a degree in gerontology), Carroll volunteers weekends to the Clearwater Marine Aquarium where he works with a young amputee dolphin named Winter. Carroll developed the world's first prosthetic tail that replaces the entire tail fluke of a dolphin. The real life survival story of Winter and Carroll's innovative prosthetic tail design came alive on the silver screen on September 23, 2011 in a 3D feature film staring Morgan Freeman, Ashley Judd, Kris Kristopherson, and Harry Connick, Jr.

Carroll is an American Board Certified Prosthetist and was named a Fellow of the American Academy of Orthotics and Prosthetics, one of the highest honors of the profession. He is a member of the International Society for Prosthetics and Orthotics, a professional advisor for the Amputee Coalition, a member of the National Association of Professional Geriatric Care Managers, and a member of the British Association of Prosthetics and Orthotics (BAPO).

MEETING INFO

NEWCOMER (a new member or first time attendee)**:** NCURA encourages new members and first time attendees to take advantage of the many opportunities the Spring Meeting offers to network and share ideas with your like-minded colleagues. Attend the Newcomer Reception, participate in the various events such as dinner groups, breakfast round table discussions, and daily lunch in the Banyan Breezeway. Be sure to come out for Tuesday night's Regional Dinner Celebration, introduce yourself to people you have never met, and kick off your shoes in the warm sand!

AMBASSADORS: Keep an eye out for Meeting Ambassadors (they will be wearing a special teal Ambassador ribbon). They are available during the meeting to help you navigate to session locations and to answer any questions. If they can't answer your question, they know someone who can!

EVALUATIONS: Your feedback is critical to the success of our meeting. Please take a moment to complete the surveys you receive so that we can continue to improve the Regional Spring Meeting experience.

HANDOUTS: We are going green and not printing hard copies of the session presentations. If you wish to print out hard copies, please visit the Spring Meeting website: http://ncura2014.digitalunited.net/program/. The website will be updated as presentation handouts are received. If you are attending a half-day or full-day workshop, workshop materials/handouts will be provided and distributed at the workshop.

REGION BUSINESS MEETINGS: Regions hold a Business Meeting each year at the Regional Spring Meeting. Everyone is welcome and encouraged to attend! If you are not part of either Region I or Region II, you may choose whichever lunch you would like to attend.

GUIDEBOOK: This year we are offering Guidebook to make your meeting experience more interactive and easy to navigate! Download the FREE Guidebook app for iOS or Android and search for NCURA Region II/III Joint Spring Meeting. Once there, let us know you have arrived by checking in under the Attendees menu. Customize your own schedule by choosing sessions under the My Schedule menu. Navigate to sessions using the Maps menu. Find networking opportunities and social activities under the Networking and Social Events menus. Last but not least, get up-to-the-minute updates on any last minute changes to the program schedule or planned activities through the Inbox menu!

TRACK KEY: Tracks are designed to ensure that attendees are able to choose topic-specific, level-appropriate sessions to further learning and meet educational objectives. The tracks represent top-level subject areas for research administration and general professional development.

VOLUNTEER OPPORTUNITIES: We are always looking for a few good volunteers! The time you invest in volunteering not only helps our organization succeed, but provides a great opportunity for you to utilize your skills and learn something new. It's a win-win for everyone - so go ahead, volunteer! For opportunities to get involved, please visit the Spring Meeting website: http://ncura2014.digitalunited.net/volunteer/ or sign up at Meeting Check-in.

WORKSHOPS: Consider attending a half-day or full-day workshop. If you have not already signed up for a workshop, don't miss out! You may register online at the Spring Meeting website http://ncura2014.digitalunited.net/registration/ or onsite at Meeting Check-in. Please note that there is an additional cost associated with workshop offerings.

QUESTIONS? During or after the meeting, reach out to a Meeting Ambassador, email one of the Program Co-Chairs (see information located on page 26), or visit the Meeting Check-in area where someone will be most happy to assist!

WORKSHOPS

FULL DAY
SATURDAY, MAY 3 & SUNDAY, MAY 4

SATURDAY | Full-Day Workshops | 8:30 AM - 4:30 PM

WS1: NIH Fundamentals
Content Level: Overview **Track:** Federal
Full day workshop designed to orient research administrators who are working with NIH grant mechanisms.
Speaker: Dede Rutberg, National Institutes of Health
Room: Citrus

WS2: Managing Proposals and Awards from a Departmental Perspective
Content Level: Intermediate **Track:** Post-Award
Research administration responsibilities can be overwhelming. The process of putting a proposal together, managing a grant once funded and properly closing it out at the end are the day-to-day activities that department administrators struggle with. This session will introduce best practices that will assist department administrators with pre and post award administration. This workshop will focus on topics that influence the daily operations of managing pre and post award. It is designed for research administrators and will provide them with an overview of the significant principles and issues surrounding proposals, grants and contracts. Topics will include proposal and budget development, identifying key personnel, subcontract versus service agreement and cost sharing. This session will also focus on preparing financial status reports, account reconciliation, closeout of awards, cost transfers, allowable and allocable costs and much more.
Speakers: Tolise Miles, Children's National Medical Center; **Anne Albinak**, Johns Hopkins University; **Erin Bailey**, University at Buffalo; **Tamara Hill**, Emory University; **Erika Cottingham**, University of North Carolina at Charlotte; **Timothy Schailey**, Christiana Healthcare Systems
Room: Glades

WS3: The Basics & Hot Topics in Pre Award Research Administration
Content Level: Basic **Track:** Pre-Award
This workshop will provide a broad overview of various topics that involve fundamental pre-award activities in sponsored projects administration, designed for anyone new to research administration or for those who just need a refresher. This session will cover the many diverse responsibilities of pre-award administration, including rules, regulations and agreements; research integrity; electronic research administration; office models and organization; proposal development, review and submission; and more. Come prepared for a lively discussion to interact, learn and share your experiences in an enjoyable setting! Participants in this workshop will develop a comprehensive understanding of the various services, functions, policies, regulations, and best practices in pre-award, as well as a concept of the importance of strong pre-award administration in the overall structure of research administration.

So you understand the core competencies of pre-award administration - now what? How do you apply these concepts to your daily life as a Departmental or Pre-award administrator in today's world? What do the sponsors review and what other institutions are looking for? How are other institutions changing their practices to keep pace with changes in the many regulations? Current "hot topics" case studies, that have been constructed using real life scenarios, serve as the core of this workshop. Participants will apply the foundational principles of the OMB Circulars, federal regulations, program announcements and common institutional policies and procedures to work through the many shades of grey that make up pre-award administration. This promises to be a lively, highly interactive experience that will allow attendees to learn from the instructors as well as the other attendees.
Speakers: Dennis Paffrath, University of Maryland at Baltimore; **Denise Clark**, University of Maryland; **Kris Wolf**, Fordham University
Room: Jasmine

SUNDAY | Full-Day Workshops | 8:30 AM - 4:30 PM

WS4: Intellectual Property Management and Negotiating Strategies for Research Administrators
Content Level: Intermediate **Track:** Post-Award
Universities are seen as the economic development engines for their respective state and local economies and are expected to be the source of new technology for the industries of tomorrow. More often than not, intellectual property is at the root of most new technology-based industries. Research administrators are expected to negotiate agreements and manage IP in support of these economic development activities. Often, the expectations of both parties are in conflict, the university policies and federal restrictions that universities granting IP rights must consider. This workshop focuses on the many challenges facing research administrators who manage intellectual property, negotiate private industrial research agreements, and state and federal awards.
Speakers: Gregory Slack, Clarkson University; **George McGuire**, Schoenick & King
Room: Citrus

WORKSHOPS

HALF DAY
SUNDAY, MAY 4

Half-Day Morning Workshops | 8:30 AM - Noon **Half-Day Afternoon Workshops | 1:00 - 4:00**

WS5: Managing the PUI Enterprise from Soup to Nuts: Overview and Best Practices
Content Level: Overview **Track:** PUI
Research administrators at PUIs encounter expectations that are often unrealistic, from knowing every funding source for every discipline, to knowing about and handling every compliance regulation ever written, to fail-proof methods for increasing grants submissions, to developing faculty grant writing skills, to being a budget whiz, and, among other position-specific skills, to knowing everything about how all the other offices at our institutions operate. This interactive workshop focuses on the uniqueness of research administration at predominantly undergraduate (PUI) and non-research-intensive (NRI) institutions.
Speakers: Angela Sgroi, The College of New Jersey; **Magui Cardona**, University of Baltimore; **Mary Louise Healy**, Johns Hopkins University; **Pam Whitlock**, University of North Carolina at Wilmington (emeritus); **Martin Williams**, William Patterson University
Room: Glades

WS6: Understanding and Negotiating Basic Contract Terms - Legalese for Beginners
Content Level: Intermediate **Track:** Post-Award
This workshop will provide a brief overview of contracting principles and negotiation techniques, as well as explain the meaning of common legal terms and clauses. Techniques to review contracts, identify troublesome clauses, and negotiate alternate contract language will be covered.
Speaker: Alexandra Albinak McKeown, Johns Hopkins University; **Charles Bartunek**, Johns Hopkins University
Room: Jasmine

WS7: OMB Circulars and Allowable Costs
Content Level: Basic **Track:** General
This workshop will explain the differences in the OMB Circulars A-21, A-110, and A-133 and why they are important in grant management. Additionally, through real-life scenarios, participants will be given hands-on application in determining allowable, allocable, and reasonable costs on sponsored awards using the circulars as well as have a better understanding of how the information is applied. This workshop will also take a look at where the guidance from these circulars can be found in the new Uniform Guidance, Cost Principles and Audit Requirements for Federal Awards.
Speakers: Robert Bingham-Roy, Georgia Institute of Technology; **Kay Gilstrap**, Georgia State University
Room: Palms

WS8: Compliance Overview: What You Need to Know about Research Compliance
Content Level: Overview **Track:** General
This workshop will focus on understanding the department, compliance and pre-award administrator's role in establishing and maintaining a successful research compliance program. This session will provide collegial examples of effective programs that assure continuous compliance in the related areas including human subjects research (IRB), animal subject research (IACUC), financial conflict of interest (FCOI), Institutional Biological Safety (IBC) and Responsible Conduct of Research (RCR).
Speakers: Carpantato (Tanta) Myles, University of Alabama; **Joseph Smith**, University of Maryland, College Park
Room: Sabal

WS9: Identification of Export Control Issues in Sponsored Programs: A Panel Workshop on Proven Export Control Methods to Identify EAR/ ITAR/OFAC Issues
Content Level: Intermediate **Track:** General
This workshop will deliver practical information on proven export control methods implemented by universities to identify sponsored programs that may be subject to export regulations administered by the Departments of State, Treasury and Commerce. Information will include a brief overview of regulations, pre and post award export control indicators, contract clause negotiation and important recent updates. Workshop faculty will use real-world examples to facilitate learning and discussion.
Speakers: Michael Miller, University of Central Florida; **Allen DiPalma**, University of Pittsburgh; **Laurianne Torres**, Duke University; **Kay Gilstrap**, Georgia State University
Room: Glades

WS10: Subaward Administration: An Overview of the Subaward Life Cycle
Content Level: Overview **Track:** Post-Award
This workshop will explore the life cycle of subaward administration from proposal preparation through award management and closeout. the function of administering subawards is a shared responsibility between departmental and central administration offices. This workshop will examine the roles and responsibilities of all parties involved to ensure compliance with the complexities of federal regulations. The workshop will also focus on sharing tips, strategies and practical guidance, and is designed to introduce the topic to newcomers, as well as provide comprehensive tools to more experienced research administrators.
Speakers: Toni Lawson, University of Maryland; **Debra Murray**, Georgetown University
Room: Jasmine

WS11: Designing Successful Training Programs Using Instructional Design Principles
Content Level: Basic **Track:** General
This workshop will delve into instructional design principles, providing an in-depth look at tools and models that will enable you to develop and implement successful and engaging training interventions at your institution.
Speakers: Brigette Pfister, Virginia Commonwealth University; **Melanie Hicks**, University of Tampa; **Laneika Musalini**, Tri-County Technical College
Room: Palms

WS12: Teaching Proposal Development: How to Show PhDs the 1 2 3s of RFPs
Content Level: Basic **Track:** Pre-Award
Proposal writing workshops have been a traditional strategy for helping faculty establish their careers. Responsibility for providing proposal writing instruction often falls on research administrators, particularly at the departmental and pre-award level with faculty whose proposal-writing experience is highly variable. Topics to be covered in this workshop will review the challenges face in teaching faculty proposal writing and strategies that can enhance faculty learning and skill development.
Speakers: Jennifer Toll, Johns Hopkins University; **Barbara Gray**, East Carolina University
Room: Sabal

MONDAY, MAY 5

CONCURRENT SESSIONS & DISCUSSION GROUPS

10:45 AM - 12:00 PM

CONCURRENT SESSIONS

Uniform Guidance: Major Changes to Federal Cost Principles
Content Level: Intermediate **Track:** Federal
OMB recently issued the most far-reaching reform of Federal grant rules in history. The new policy consolidates the OMB circulars on cost principles, administrative requirements and non-Federal audits and makes major changes to the Federal rules in these areas. This session will review the major changes to the cost principles for educational institutions and nonprofit organizations, currently in Circulars A-21 and A-122. The session will address the main changes to the rules on direct charges; the policies on the calculation of Facilities and Administrative (F&A/indirect) cost rates; and the application of Cost Accounting Standards and Disclosure Statement requirements to educational institutions.
Speakers: Cynthia Hope, The University of Alabama; **Mark Davis**, Attain, LLC
Room: Tarpon / Sawyer / Long Theater

Responding to the NIH Subaccounting Challenge in our Ever-Changing World
Content Level: Intermediate **Track:** Federal
In July and September of 2013, NIH announced changes to the long-standing "pooled" Letter of Credit Draw process to introduce subaccounts. Along with this major change, requirements for closeouts were announced requiring tight turnarounds and affecting our ability to collect funds. As federal sponsors are trying to provide appropriate oversight and stewardship of public funds, we must find efficient ways to respond to these new requirements that fit within our institutional systems and environments. This workshop explains the current state of NIH's changes, explores their implications on higher ed institutions and offers some strategies and an opportunity to share in the challenge.
Speakers: Michelle Rigsbee, Duke University; **Meredith Rentz**, Wake Forest University Health Sciences
Room: Citrus

Ask NIH
Content Level: Basic **Track:** Federal
Ask a NIH Chief Grants Management Officer any grants management question. Questions may be about policy, administrative and/or fiscal issues.
Speaker: Dede Rutberg, National Institutes of Health
Room: Glades

Research Administration Services: Shared Model Concept
Content Level: Basic **Track:** Departmental
The class summarizes the experiences of transitioning to a Shared Model for Research Administration of Emory University. The class will go from the start of concept through implementation with a review of what worked; what did not work; and where we are headed.
Speakers: Bill Lambert, Emory University; **Dean Surbey**, Emory University
Room: Jasmine

Getting the Most out of Mentoring Relationships
Content Level: Basic **Track:** General/Senior
Mentoring is a valuable process that should provide benefits to both the mentor and the mentee whether it is happening in a personal or professional situation. But why are some mentoring relationships more successful than others? Working around the presenter's experience in the NCURA PUI Community Mentoring Program, the session will look at the roles and characteristics of a good mentor and mentee, the value of defining goals and of the method of communication together, and the importance of identifying when the relationship is being successful and -- maybe more importantly -- when it is not.
Speakers: Martin Williams, William Paterson University; **Tim Linker**, High Point University
Room: Palms

DISCUSSION GROUPS

Keeping the Best and the Brightest: Managing People in Tough Times
Content Level: Overview **Track:** General/Senior
To be a good leader you must learn to effectively manage your team or run the risk of losing valuable people. We have gathered a team of senior administrators who will teach you how to motivate, inspire and encourage your staff. They will share their personal experiences that have helped them to thrive as supervisors, and help steer you away from fail practices. Learn how to reach goals and contribute to the success of your organization by understanding what your role is, as a manager. This session will provide tools and techniques that can be used in your day-to-day routine.
Speakers: Tolise Miles, Children's National Medical Center; **Anne Albinak**, Johns Hopkins University; **Dennis Paffrath**, University of Maryland; **Pim Thurkall**, Georgetown University; **David Smelser**, University of Tennessee; **Maureen "Mo" Valentine**, University of Memphis
Room: Royal Tern

Developing a Subrecipient Monitoring Compliance Program: Where do I Begin?
Content Level: Overview **Track:** Pre-Award
Subrecipient monitoring has become a hot topic in audits. Federal regulations provide general guidance to recipients. In this discussion group, we will explore some practical ways to implement subrecipient monitoring programs at our institutions. It simply isn't a one size fits all approach. Attendees will be encouraged to share ideas and resources for monitoring subrecipients.
Speaker: Toni Lawson, University of Maryland
Room: Blue Heron

MONDAY, MAY 5

CONCURRENT SESSIONS & DISCUSSION GROUPS

1:30 PM - 2:45 PM

CONCURRENT SESSIONS

NIH Update
Content Level: Update **Track:** Federal
An update of recent NIH policy and compliance changes that may affect pre- and post-award actions.
Speakers: Victoria Bishton, National Institutes of Health
Room: Tarpon / Sawyer / Long Theater

The Faculty Writing Workshop Model: Growing Your Department's Scholarly Capacity
Content Level: Advanced **Track:** Departmental
This session will present and discuss an overview, design, and implementation of a new initiative -- the Faculty Writing Workshop -- led by a senior staff member in the school/department's office dedicated to scholarly and research development. The Faculty Writing Workshop developed in May 2013 at Columbia University School of Nursing is based upon a collaborative, supportive learning environment where 6 faculty members present manuscripts for "peer -review" by others members of the group just prior to submission to a professional journal. Manuscript strengths and weaknesses are discussed, providing the author with guidance for revisions, ultimately leading to a stronger piece of writing with a higher likelihood of publication as well as modeling techniques for writers to become more effective revisionists of their own writing. The Writing Workshop has truly become a "value-added" resource to scholarly and research-oriented faculty members, already garnering repeat participants, and has recently been expanded into the nursing student PhD and DNP curriculum. This model can be adapted to faculty writing workshops focusing on grant preparation, leading to clearer, strong grant applications and overall increased funding rates.
Speaker: Kristine Kulage, Columbia University
Room: Citrus

Building on your Strengths: Assessing Investigator Needs to Increase Research Productivity and Funding Success
Content Level: All levels **Track:** Pre-Award
It's no secret that competition is everywhere, especially in the Federal funding arena. With competition increasing and research funding decreasing, cultivating a culture of collaboration across campus is more important than ever. This session gives practical tips and advice for assessing and responding to the needs of multi-investigator teams.
Speaker: Laurianne Torres, Duke University
Room: Glades

Herding Cats: Navigating Multi-Party Collaborations
Content Level: All Levels **Track:** PUI
This session will outline strategies for acquiring and managing large multi-organization collaboration grants. Although relevant to any organization, it will be of particular interest to Predominantly Undergraduate Institutions (PUI) who often shy away from these endeavors based on their unique staffing and resource challenges. Two highly successful model collaborative grants will serve as illustrations for lessons on reaching out to potential partners, building the right team, division of labor, management of resources and overall accountability. Following the presentation, the audience will be invited to participate in an open discussion where issues can be brainstormed and problem solved.
Speaker: Melanie Hicks, The University of Tampa
Room: Jasmine

Pre and Post-Award Collaboration: The Key to Effective Research Administration
Content Level: Intermediate **Track:** Post-Award
The session will address the ongoing issues between the pre-award and post-award administration and department/centers. Presenters will give an overview of the cradle-to grave process at their institutions and suggest ways to improve the communication lines between central administration, faculty and research support staff. One important thing to remember as a research administrator is that all of us have a common goal: to serve our PIs and help them to achieve their research goals while ensuring that we're complying with OMB Circulars, sponsor-specific guidelines and institutional policies. Often times, institutional research offices split pre and post-award functions. The reason behind this is to have experts in both functions while enhancing the quality of service provided to the customer – the PI's. While pre and post-award duties are often defined by certain responsibilities adopted by an organization, a lack of communication between a pre and post award administrator often result in misunderstandings that reduce operational efficiencies. In this session, attendees will walk away with an understanding of the importance of reaching out to learn more about the other "side of the house" as a way to meet organizational goals.
Speakers: Tim Schailey, Christiana Healthcare Systems; **Jorge Vazquez**, Huron Consulting Group
Room: Palms

DISCUSSION GROUPS

Hot Topics
Content Level: Advanced **Track:** Pre-Award
So you understand the core competencies of research administration - now what? How do you apply these concepts to your daily life as Departmental or Pre-award administrator in today's world? What do the headlines tell you about what you should be looking for at your institution? How do you keep abreast of hot topics around the country and what do you do with that information? Current "hot topics" serve as the core of thought-provoking session. This promises to be a lively, highly interactive experience that will allow attendees to learn from the instructors as well as the other attendees.
Speakers: Denise Clark, University of Maryland; **Beth Brittan-Powell, PhD;** University of Maryland; **Anita McKinney**, Georgia Institute of Technology; **Dana Simpson**, Georgia Institute of Technology
Room: Royal Tern

Measuring for Success: Using Metrics in Sponsored Programs Management
Content Level: Basic **Track:** Post-Award
This session will provide an overview of one university's experience of introducing performance metrics in the management of the centrol sponsored programs office. The presenters will discuss their approach to assessing current baselines, establishing benchmarks and identifying targeted areas for improvement.
Speaker: Jane Gentilini, University of Central Florida; **Celeste Rivera-Nunez**, University of Central Florida
Room: Blue Heron

MONDAY, MAY 5

CONCURRENT SESSIONS & DISCUSSION GROUPS

3:00 PM - 4:15 PM

CONCURRENT SESSIONS

NSF Update

Content Level: Update **Track:** Federal

An update of recent NSF policy and compliance changes that may affect pre- and post-award actions. This session is being offered by NSF via a live remote session coordinated by an onsite facilitator.

Speaker: Samantha Hunter, National Science Foundation

Room: Tarpon / Sawyer / Long Theater

There is no "I" in Team, But There is a "U" in Success: How to Become a Successful Manager and Lead in Research Administration

Content Level: Overview **Track:** General/Senior

One of the most important functions performed by senior research administrators is managing people. While there are no fool-proof methods for supervising staff, there are plenty of good practices that have evolved over the years. This session will provide an opportunity to share examples of what has worked, and what has not worked in the research arena. It will confront the day-to-day human resource issues that administrators have to respond to on a daily basis while trying to manage their department effectively.

Speakers: Deborah Bassard, Georgetown University Medical Center; **Roberta Kelley-Paul**, Georgetown University Medical Center

Room: Citrus

Managing Faculty Funding Sources from Inception to Close-out

Content Level: Basic **Track:** Departmental

From inception to close-out, it is a long and arduous process for the Research and/or the Department Administrator to watch closely their Faculty's funding sources. With many grants ending before new ones begin, an Administrator must sometimes become "creative" to keep their Faculty getting paid. Research Administrators must demonstrate additional resourcefulness for expenses other than personnel services, especially when funding sources are in a "use or loose" situation. Where do you find these "bridging funds" and when should an Administrator use them? This session will help Administrators to decide when to make salary cost transfers and from which sources they should use. This session will help the Administrator understand the various facets that make up a Faculty's salary, will also demonstrate the importance of taking a "big picture approach" when using various sources, and how effort reporting and Faculty funding are directly related.

Speaker: William Hoffman, University of Maryland

Room: Glades

How to Manage a Budget

Content Level: Basic **Track:** Post-Award

Monitoring your budget once funded is essential to making sure your project expenses are being expended correctly and fully through the life of the grant. We will review how to reconcile and encumber funds as well as discuss how to determine whether expenses are allocable, reasonable and applicable.

Speaker: Deanna Hendrickson, Kennesaw State University

Room: Jasmine

Measuring Success of Externally-Funded Programs at PUIs

Content Level: Intermediate **Track:** PUI

Research intensive, larger schools typically have in place metrics to measure success of their sponsored programs offices. These are often based on the National Science Foundation's R&D Survey or similar national standards that focus quantitative measurements such as number of faculty involved in sponsored research correlated with total funding expenditures. However, at smaller institutions, and particularly those that have combined Sponsored Programs and Corporate/Foundation Relation offices and at PUIs, these purely quantitative measures offer little insight into the true impact of externally funded programming on campus. As well, obtaining relevant comparative data is a challenge. Through a presentation and discussion format, we hope to examine both quantitative and qualitative measures of success that are being used at PUIs, and to discuss strategies for integrating items such as mission alignment and student learning impact into metrics among PUI sponsored programs and CFR offices. This will be accomplished by detailing in place measures at several PUI's in NCURA Region 2 and through a moderated discussion of opinions and data gathered through a professional network of PUI SP/CFR offices in Western NY (primarily).

Speaker: Adrienne Stanfill, Niagara University

Room: Palms

DISCUSSION GROUPS

Smaller Offices: How Do We Survive?

Content Level: Overview **Track:** PUI

Research administration offices at smaller institutions have all the responsibilities of those at large research-intensive institutions, but far fewer resources. This discussion section will focus on sharing best practices and on strategies that research administrators in smaller offices can use to best serve their faculty, (and their administration) while maintaining good mental health.

Speaker: Carol Burdsal, PhD, Bucknell University

Room: Royal Tern

Limited Proposal Submissions: Who decides?

Content Level: Intermediate **Track:** Pre-Award

Many sponsors offer programs that restrict the number of proposals that can be submitted by the institution or by the academic unit within the institution. How do you identify these limited submission opportunities? How do you distribute information regarding these restricted opportunities to your faculty? If only one PI can submit, but more than one PI wants to submit – who decides which proposal goes to the sponsor? What's the basis for that decision? And what do you do when multiple proposals appear at the last moment? All these and more related topics will be discussed in this interactive session. Participants are encouraged to bring questions or situations occurring at their own institution for discussion.

Speakers: Danielle McElwain, University of South Carolina

Room: Blue Heron

TUESDAY, MAY 6

CONCURRENT SESSIONS & DISCUSSION GROUPS

9:15 AM - 10:30 AM

CONCURRENT SESSIONS

Council on Governmental Relations Update

Content Level: Intermediate **Track:** Federal

The Council on Governmental Relations (COGR) is an association of almost 200 U.S. research universities and their affiliated academic medical centers and research institutes, concerned with the influence of federal regulations, policies, and practices on the performance of research and other sponsored activities conducted at its member institutions. COGR Board members will present a Washington update, discussing the significant research policy and regulatory issues currently facing the research community.

Speakers: Alexandra Albinak McKeown, Johns Hopkins University; **Cynthia Hope**, The University of Alabama

Room: Tarpon / Sawyer / Long Theater

When Congress Calls: Responding to a Congressional Inquiry of the ACA Navigators Grant (Case Study)

Content Level: Intermediate **Track:** Departmental

Under the Affordable Care Act, 105 entities were awarded grants totally $67 million to provide trained and certified Navigators to assist consumers in evaluating their new health insurance options in the 34 Federally-facilitated and State Partnership Marketplaces. The Committee on Energy and Commerce of the U.S. House of Representatives sent letters to 51 of these entities to investigate their application for and use of the grants. In this session, we will discuss the University of Georgia's process for responding to this inquiry, other challenges faced, and lessons learned.

Speaker: Michael McGough, University of Georgia

Room: Citrus

How Can Scientific and Administrative Collaboration Help You Reduce Your Woes in Administering Clinical Research?

Content Level: Intermediate **Track:** Medical

In this session, senior administrators from Georgetown University Medical Center will share insights gained from Clinical Translational Science Award and Comprehensive Cancer Center collaborative clinical research-related activities such as and invite others to participate in a discussion of best practices in clinical research.

Speakers: Doreen Robinson, Georgetown University Medical Center; **Haewon Park**, Georgetown University Medical Center; **Tony Hursey**, Georgetown University Medical Center

Room: Glades

Closeouts: Doing Them Effectively and Efficiently

Content Level: Basic **Track:** PUI

Basic suggestions for an efficient and effective award close out. How to prepare for closeout once you receive the award, items that need to be submitted 90-days from the performance end date, typical items that could arise after 91 days, and obstacles that could arise as well.

Speakers: Anna McCoy, Kennesaw State University; **Adrienne N. Larmett**, Baker Tilly

Room: Jasmine

Shared Services: Implementing the Coordinated Research Administration Model

Content Level: Intermediate **Track:** Post-Award

There has been a lot of interest recently in the implementation of the Shared Services research administration model. This model combines pre-award, post-award, and departmental administration functions into one group (i.e. Shared Services). The model promises improved customer service, one point of contact for a variety of business functions, and all at a cost savings to your institution. Deploying this model is very tricky and involves a deep understanding of the people, process and technology involved in research administration at your institution. This session will present strategies surrounding the Shared Services model in order to develop a sound project approach to consider the merits of the model, deciding whether this is right for your institution, and how to manage its implementation should your institution want to embark on this new frontier.

Speakers: Martin Smith, Attain, LLC; **Mark Davis**, Attain, LLC;

Room: Palms

DISCUSSION GROUPS

How to Draft the Best Contract for Your Organization: Cooperative Agreements, Memos of Understanding, Service, Supply and Data Contracts and More

Content Level: Overview **Track:** Pre-Award

This session will cover the various types of agreements that are encountered during the research administration process. Against this backdrop, this session will cover how these issues are often considered from the perspective of a reviewing attorney.

Speaker: Ajoy Mathew, Children's National Medical Center; **Jorge L. Vázquez**, Huron Consulting Group

Room: Royal Tern

All of the People Can't Be All Right All of The Time: Providing Excellent Customer Service to Multiple Stakeholders

Content Level: Overview **Track:** General/Senior

Facilitating research involves working with multiple stakeholders, such as departmental and central offices, faculty and staff (senior and junior), and institutional oversight and agency representatives. It also involves navigating various, and often conflicting, requirements, such as institutional policies and federal/sponsor regulations. How do we provide excellent customer service when caught between the department and the central offices, the faculty and the staff, institutional policies and federal or agency rules, and our own institution and the sponsor? This discussion group will explore the viewpoints of different stakeholders, and discuss best practices such as defined responsibilities, role clarity, clear communication and expectations, and the importance of tone when providing excellent customer service.

Speakers: Ted Fehskens, Johns Hopkins University; **Leerin Shields**, University of Maryland, Baltimore; **David Schultz**, University of Louisiana at Lafayette

Room: Blue Heron

TUESDAY, MAY 6

CONCURRENT SESSIONS & DISCUSSION GROUPS

10:45 AM - 12:00 PM

CONCURRENT SESSIONS

Why PIs Always Had it Better at Their Previous Institution

Content Level: Basic **Track:** General/Senior

PIs are always commenting on how something was better at their old institution. Is it really true? Most of the time it's not, but that feeling develops for a number of reasons. While hard to hear, it's actually a wonderful thing because of the opportunities it presents. Capitalizing on these complaints will make any Research Administrator better.

Speakers: David Smelser, University of Tennessee; **Justo Torres**, University of North Carolina at Chapel Hill; **Laurianne Torres**, Duke University

Room: Citrus

The Basics of Developing a Proposal Budget

Content Level: Basic **Track:** Departmental

Have you been struggling to put budgets together? Unsure of what should be included? Developing a budget can be very complicated and can impact the project if not prepared properly. Join us for a hands-on session on the basics of developing a budget.

Speakers: Erika Cottingham, University of North Carolina at Charlotte; **Tamara Hill**, Emory University; **Valerie Crickard**, University of North Carolina at Charlotte

Room: Glades

The New Research Administrator Versus an Experienced Research Administrator: the Continual Work of Staff Development

Content Level: Basic **Track:** General/Senior

The session will offer best practices for training brand new and also experienced Research Administrators. Presenters will introduce the effective practices and tools of their training programs for RA staff. Participants are encouraged to bring their best practices and questions on this issue.

Speakers: Robin S. Lewis, Georgia College & State University; **Keith Anderson**, University of South Florida; **Tracy Norris, M.Ed.**, Georgia College & State University

Room: Jasmine

You're not in Kansas Anymore: Navigating The Alphabet Soup of Pre-Award Research Administration

Content Level: Basic **Track:** Pre-Award

Taking on the role as a new individual in research administration can present one with a learning curve that can be quite steep. This session, with its focus on Pre-award administration, will provide knowledge for creating a basic toolkit for success as one ascends the learning curve. Topics to be addressed will include learning about sponsors, their language and proposal requirements; commonly used acronyms; using technology efficiently to provide quality customer service; and successfully approaching the review and negotiation of award agreements.

Speaker: Leona Joseph, University of Pennsylvania

Room: Palms

Proposal Development: How to Create an Effective Budget

Content Level: Basic **Track:** Pre-Award

Preparation of the budget is an important part of the proposal preparation process. We will walk through the budget categories and review key points to remember when writing your budget. Sample budgets will be shown and discussed.

Speakers: Deanna Hendrickson, Kennesaw State University; **Marge Dolly**, Johns Hopkins University

Room: Royal Tern

DISCUSSION GROUPS

Issues Facing Senior Managers in Research Administration

Content Level: Intermediate **Track:** PUI

Scarce resources, staffing issues, lack of written policies...sometimes it feels lonely in a senior management position ,especially if you are the only one speaking research administration “ese” . Come share your concerns and successes under a “cone of silence” with other senior research administrators as we take on topics that are causing you heartburn.

Speakers: Pamela Whitlock, University of North Carolina at Wilmington (Emeritus); **Alexandra Albinak McKeown**, Johns Hopkins University;

Room: Blue Heron

TUESDAY, MAY 6

CONCURRENT SESSIONS & DISCUSSION GROUPS

1:30 PM - 2:45 PM

CONCURRENT SESSIONS

Research Administration and Management: Models for Pre-Award Services

Content Level: Intermediate **Track:** Pre-Award

There are many different research administration and management models for pre-award services. One size does not fit all. The goal is to find a model that places the administrative burden where it makes the most sense for the institution. This session will describe the most common management models and their corresponding institutional structure.

Speakers: Maureen 'Mo' Valentine, University of Memphis; **Carmen Mendez**, Children's National Medical Center

Room: Citrus

Creating an Environment to Support Proposal Writing

Content Level: Basic **Track:** PUI

Is trying to get faculty to write proposals at your PUI an uphill battle? It's no wonder – they feel overwhelmed with their teaching load, mentoring, committees, community service and the myriad of other commitments they may have. We can't do anything about all those commitments, but we may be able to get them motivated to pursue that one idea that they are truly passionate about. Come hear how a few of us are encouraging our faculty to submit proposals and let's talk about what you might do at your institution. It's going to be a dynamic get together.

Speakers: M.J. West, University of North Carolina at Wilmington; **Debbie Shaver**, Georgia Southern University; **Dennis Paffrath**, University of Maryland, Baltimore

Room: Glades

Keeping in Touch with the In-laws: Successful Subcontract Management for the Departmental Administrator

Content Level: Intermediate **Track:** Departmental

This session will examine what the department administrator needs to know and do to manage out-going subcontracts for the life of the project: from proposal to award through noncompeting budget years to closeout.

Speakers: Jeanne Galvin-Clarke, University of Maryland, Baltimore; **Robert Bingham-Roy**, Georgia Institute of Technology; **Toni Lawson**, University of Maryland

Room: Jasmine

Hot Topics in Post Award for PUIs

Content Level: Overview **Track:** PUI

Supplemental pay, effort reporting, administrative salaries, cost transfers, p-cards, subaward monitoring… What topics keep you up at night? How do your PUI colleagues handle these issues? PUI's and non-research intensive institutions face the same issues as larger institutions, but differences in organizational culture can make these issues more complex and compliance a daunting task for a one-person or small office. This session will help you identify hot topics and key areas of financial compliance all institutions should pay attention to, as they continue to be a focus of federal audits, with special emphasis to the constraints faced by PUIs.

Speaker: Magui Cardona, University of Baltimore

Room: Palms

Debunking Common Research Administration Myths

Content Level: All levels **Track:** Pre-Award

This session will feature an educational game technique using TurningPoint clickers. Participants will have the opportunity to compare their knowledge of various topics within Research Administration to that of their peers in a fun, anonymous setting. Participants will interact with their peers in a spirited, collegial game. Topics will range from our favorite compliance challenges (IRB, IACUC, conflict of interest, the A-81 uniform guidance) to those nagging FAR clauses and IP issues, with plenty in between. Immediate feedback will provide answers and opportunity for discussion of these hot topics.

Speakers: Deborah Smith, University of Tennessee Health Science Center; **Jeanne Herman**, University of Tennessee Health Science Center; **Tricia Page**, University of Tennessee Health Science Center

Room: Royal Tern

DISCUSSION GROUPS

Issues facing Senior Managers in Research Administration

Content Level: Advanced **Track:** General/Senior

This session is designed for the senior administrator and will focus on current hot topics and time pressures associated with addressing the ever changing world of research administration. Maintaining a positive outlook and keeping a work-life balance is an ever growing concern and this presentation will focus on how to achieve performance goals while avoiding "burn out".

Speakers: Denise Clark, University of Maryland; **Vivian Holmes**, Broad Institute of MIT; **Kathleen Larmett**, NCURA

Room: Blue Heron

TUESDAY, MAY 6

CONCURRENT SESSIONS & DISCUSSION GROUPS

3:00 - 4:15 PM

CONCURRENT SESSIONS

Understanding the A-81 Administrative Requirements

Content Level: Overview **Track:** Pre-Award

This session will provide an overview of current and future administrative requirements for Grants and Agreements with the Federal Government, otherwise known as A-110/A-102, or the Administrative Requirements section of the combined guidance, A-81. We will pay particular attention to differences between the previous version and A-81.

Speaker: Jennifer Toll, Johns Hopkins University

Room: Tarpon / Sawyer / Long Theater

Doing More with Less at PUIs

Content Level: Intermediate **Track:** PUI

Research administrators at Primarily Undergraduate Institutions (PUIs) are often asked to perform many tasks including managing existing awards, beginning new initiatives and increasing proposal activity with little or no resources at his or her disposal. This session will describe situations one may face at a PUI. The audience will be asked to participate in discussing strategies that can be implemented to help ease daily challenges and achieve individual and institutional goals.

Speaker: Dominic Esposito, Manhattan College

Room: Citrus

Diversity Daze: Bridging the Cultural, Generational and Gender Divides

Content Level: Basic **Track:** General/Senior

Valuing diversity means to encourage and recognize people for who they are and helping them to develop to their full potential. This interactive session looks at how a diverse workforce can bring creativity to a team and how to respect others opinions, even when we may not agree.

Speakers: Debbie Grover, University of Maryland; **Danette Boone**, University of Maryland; **Mandy McCaslan**, Clemson University

Room: Glades

Research Administration as a Profession

Content Level: Basic **Track:** General/Senior

Who thought they would end up with a job in research administration? This session will explore 4 different individual career paths, all at varying levels, and what led them to a career in research administration. The session will touch on the many different positions available around the world within research administration and the various steps to take for career development and advancement.

Speakers: Denise Clark, University of Maryland; **Kathleen McKeon**, University of Maryland; **Julie Ward**, University of New South Wales; **Jeffrey Snider**, University of Maryland, College Park

Room: Jasmine

The Creative and Research Activities Development and Enrichment Program for Faculty Development

Content Level: Intermediate **Track:** PUI

Creative and Research Activities Development and Enrichment (CRADLE) is a faculty development program at Wake Forest University. The goal of CRADLE is to help faculty improve their grantsmanship and develop superior research programs and creative activities. Since fall 2007, 29 faculty have graduated from the CRADLE program. Join us to hear about our successes and lessons we've learned from running this program. Be ready to share ideas for creating a faculty development program at your institution.

Speakers: Lori Messer, Wake Forest University; **Stephen Williams**, Wake Forest University

Room: Palms

The Ins and Outs of Cost Sharing

Content Level: Intermediate **Track:** Post-Award

Cost Sharing is always a hot topic for both Pre & Post award research administrators. Come prepared to learn & discuss what has worked and what has not worked when working with PI's, sponsors and subcontracts. What are the best practices and how can we make this an easier process?

Speakers: Sandy Barber, Georgia Institute of Technology; **Dana Simpson**, Georgia Institute of Technology

Room: Royal Tern

DISCUSSION GROUPS

Procurement Card Monitoring and Management

Content Level: All levels **Track:** Departmental

Procurement cards are a convenient and expedient manner in which to purchase items. However, they also represent a significant audit risk. This discussion group will discuss methods and tools to effectively manage procurement cards within the department.

Speaker: Tamara Hill, Emory University; **Valerie Crickard**, University of North Carolina at Charlotte

Room: Blue Heron

WEDNESDAY, MAY 7

CONCURRENT SESSIONS & DISCUSSION GROUPS

8:45 AM - 10:00 AM

CONCURRENT SESSIONS

OMB Uniform Guidance: Cost Principles

Content Level: Intermediate **Track:** Federal

his session will focus on highlighting the changes made to federal cost principles, published within 2 CFR Part 200, on December 26, 2013. Topics will include changes to direct charging to grants, revisions to the utility cost adjustment (UCA), consolidation of the OMB Circulars and other pertinent issues. In addition, the presentation will include the MAXIMUS assessment of the impact of these changes upon the preparation of F&A Proposals, compliance issues (e.g. DS-2, etc.).

Speaker: Caroline Beeman, MAXIMUS, Inc.

Room: Citrus

Educating Faculty on Fiscal Compliance Issues: How to Get Them to Attend Training Without Food

Content Level: Basic **Track:** PUI

When you talk to your faculty about fiscal responsibilities, do their eyes glaze over? Do you have difficulties getting faculty to attend workshops/educational sessions? This session will include information on the basic fiscal responsibilities for faculty regarding their grants, award documentation, project management, account management, award closeout, and expiration/termination management. Additionally, we'll talk about some tips for enticing your faculty to attend your workshops/educational sessions while you're on a shoestring budget (no food) and some things you can try with minimal costs and/or investment of time. All attendees will be eligible for a SURPRISE PRIZE RAFFLE!

Speakers: Beryline Temples, University of Central Arkansas; **Debbie Smith**, University of Tennessee Health Science Center

Room: Glades

The Fearless Speaker: Perfecting Your Presentation Skills

Content Level: Basic **Track:** General/Senior

This session will touch upon why it's important to invest in improving our presentation/speaking skills. The ability to effectively present/speak allows us to better convey information to our superiors, colleagues and peers. It also builds trust, as well as improves our critical thinking, listening and time management skills.

Speakers: Danette Boone, University of Maryland; **Janet Wiens**, University of Memphis

Room: Jasmine

Update on MOOCS and Electronic Education

Content Level: Update **Track:** Post-Award

An update on MOOCs and the implementation of an Online Master's Degree program, including discussion of issues such as copyright and export control and strategies for dealing with both.

Speakers: Anita McKinney, Georgia Institute of Technology; **Sandy Barber**, Georgia Institute of Technology

Room: Palms

DISCUSSION GROUPS

Utilizing Other Offices to Extend Your Reach: Taking Advantage of Educating Administrative Assistants, IT, Accounting, Purchasing, Etc. So They Are Your First Line of Defense

Content Level: Overview **Track:** PUI

Explore ways to create a professional support network within your institution by sharing your knowledge and expertise in research administration with various layers of administrative staff. Even though your office may only have a few staff, there are resources throughout your campus that can provide support in multiple ways. Come share ideas in expanding outreach on your campus and stretching limited resources.

Speaker: Pam Whitlock, University of North Carolina at Wilmington (Emeritus)

Room: Blue Heron

NCURA Education Scholarship Fund

A fund to support the professional development of research administrators

This Education Fund got started by a donation from Jerry Fife, a Past President and a recipient of NCURA's Outstanding Research Administrator Award. When Jerry made the gift, he talked about how he wanted to give back to NCURA since it had made such a difference for him—not only in the subject -matter education, but also what he called "leadership lessons." Based on Jerry's gift and a bequest from another NCURA member, NCURA's Educational Scholarship Fund has been created. This fund is designed to provide access to funds, through the generosity of NCURA members, which would otherwise be unavailable.

Donate Today!

Even a little makes a difference!

WEDNESDAY, MAY 7

CONCURRENT SESSIONS

10:15 AM - 11:30 AM

CONCURRENT SESSIONS

Effective Presentations

Content Level: Career Skills **Track:** General/Senior

Informative. Engaging. Even fun. Effective presentations should be all of these things for participants. Knowing the subject matter in and out is only the starting point for making an effective presentation. This session is designed to give participants tools and tips for delivering a confident, interactive, "no boredom" presentation appropriate for adult learners. It will also offer tips geared to making effective presentations to NCURA audiences, either alone or with one or more colleagues.

Speaker: Mary Louise Healy, Johns Hopkins University

Room: Citrus

Time and Effort Reporting Without a Fancy System

Content Level: Intermediate **Track:** PUI

It may appear that large research institutions somehow have an advantage over predominately undergraduate institutions when it comes to devising an effort reporting solution. This session will prove that a Predominately Undergraduate Institution (PUI) or small research institute can design and deploy a compliant effort reporting system with little more than standard desktop office applications, a little know-how, and a dedicated research administrator leading the charge!

Speakers: Martin Smith, Attain, LLC; **David Schultz**, University of Louisiana at Lafayette

Room: Glades

Maximizing Revenue for Clinical Trials: Budgeting for Success

Content Level: Intermediate **Track:** Medical

This session will include detailed instructions for reviewing and negotiating a study budget. This seesion will also explain the reasons sponsors and sites expierience conflict related to budget issues.

Speaker: Theresa Wall, Medical University of South Carolina

Room: Jasmine

The Basics of Federal Contracts: What Does Your Contract Really Mean?

Content Level: Basic **Track:** Federal

This session will review contracting under the FAR - the focus will be on the two types of contracts that are typically received by sponsored programs offices - R&D cost reimbursement or fixed price contracts; and contracts with a value under$150 K (simplified acquisition orders). The session will review the types of FAR clauses one can expect in both types of contracts. We will also discuss negotiation strategies and the types o clauses that are appropriate for R&D work at universities.

Speaker: Rochelle Athey, Carnegie Mellon University

Room: Palms

FUNDRAISING CHALLENGE!

Each year, the American Red Cross (ARC) immediately responds to about 70,000 natural and man-made disasters in the U.S. The most common disaster is residential fire in your community. The ARC is on the scene to aid victims of disaster with daily functions such as: housing, meals, clothing, and emotional services. These services are vital for victims of disaster to begin rebuilding their lives.

Help our regions make a difference in the lives around us by raising funds to support the American Red Cross disaster relief fund.

American Red Cross

PINATA PALOOZA

$1 for 1 chance to win a piñata full of loot! Be the first to break the elusive party donkey. Don't want to take a swing but still want to join in the fun? **$2 to be the one to spin your colleague around!**

No IACUC approval required.

BATTLE OF THE SOMBREROS

Region II and Region III in a head-to-head battle to lasso the most rings on the sombrero.

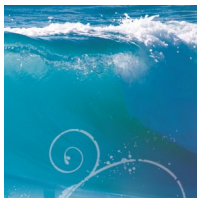
$1 for 3 rings 3 chances to help your region win the Battle of the Sombreros.

"Overhead" tosses only!

SEIS DE MAYO SCAVENGER HUNT

Teams take part in a 24-hour scavenger hunt! **$5 for teams of 2 or more.** The team with the most clues uncovered by Tuesday night's Regional Dinner Celebration takes home the prize.

Finding funding sources is a gulf "breeze" compared to this challenge!



THINGS TO DO

OUT & ABOUT IN THE ST. PETE BEACH AREA

DISCOVER THE BEAUTY

Sunken Gardens is a botanical paradise in the midst of a bustling city. As St. Petersburg's oldest living museum, this 100 year old garden is home to some of the oldest tropical plants in the region. Unwind as you stroll through meandering paths, lush with exotic plants from around the world. Explore cascading waterfalls, beautiful demonstration gardens, more than 50,000 tropical plants and flowers.

Hours: Monday-Saturday 10:00 AM-4:30 PM; Sunday Noon-4:30 PM

For additional information: 727-551-3100 or www.stpete.org/sunken.

VISIT WINTER

Home to the star of the popular film, Dolphin Tale, **Clearwater Marine Aquarium** was voted Florida's Best Attraction in 2013 by USA Today. "A Truly Unique Experience" complete with underwater viewing windows, roofless dolphin pools, a hands-on stingray beach, and many other one-of-a-kind animal homes and exhibits that are truly different.

Hours: Monday-Sunday 10:00 AM-6:00 PM

For additional information: http://www.seewinter.com/

GO WILD

Visit **Busch Gardens Tampa**, where fun comes naturally! Get your thrills on the many roller coasters and rides offered; take in some of the world-class shows; and visit state-of-the-art animal habitats. With more than 12,000 animals, Busch Gardens Tampa is one of the largest zoos in North America.

Hours: Monday-Friday 10:00 AM-6:00 PM; Saturday 9:30 AM-9:00 PM; Sunday 9:30 AM -7:00 PM

For additional information: http://seaworldparks.com/en/buschgardens-tampa/

EXPERIENCE THE DALI

Soak in the brilliance as you are surrounded by an unparalleled collection of works by renowned and influential artist Salvador Dali. See why *AOL Travel News* lists **The Dali Museum** as "One of the top buildings you have to see before you die." From its spiral staircase resembling a strand of DNA to the flowing glass dome rising 75 feet in the air., St. Petersburg's newest museum is a must see!

Hours: Monday-Wednesday and Friday-Saturday 10:00 AM - 5:30 PM; Thursdays open late! 10:00 AM - 8:00 PM; Sunday 12:00 PM - 5:30 PM

For additional information: http://thedali.org/

NETWORKING

EVENTS & ACTIVITIES

Newcomer Reception
Sunday, May 4 | 5:30 - 6:00 PM
Breck Deck North
Is this your first NCURA Regional meeting? Come join us for a Newcomer Reception and mix and mingle in the sunny Florida outdoors before the big Welcome Reception.

Welcome Reception
Sunday, May 4 | 6:00 - 7:00 PM
Breck Deck North
Kick off your shoes and get some sand between your toes while chatting with colleagues.

Regional Activities
Monday, May 5 | Meet in Lobby
Region II cruise - meet in the lobby at 6:15pm
Region III dinner groups - meet in the lobby at 6:30pm

Breakfast with Round Table Discussions
Tuesday, May 6 | 7:30 - 9:15 AM
Banyan Breezeway
Plan to attend the Quick Topic Round Table during Tuesday breakfast. Chat with colleagues on a myriad of topics. This is a perfect opportunity to build your network, so be sure to bring your business cards!

Dinner Celebration
Tuesday, May 6 | 7:00 - 10:00 PM
Breck Deck North/South
Sand? Check. Surf? Check.
Steel drum band? Check. DJ and dancing? Check.
Only thing missing is YOU!
Come out to the Breck Deck North/South patio and enjoy the amazing sunset while enjoying an delicious meal.
Join us for the Pre-Dinner Reception at 6:30pm.

Hospitality Suite
Come relax, network, hangout with colleagues each night in the Hospitality Suite.
Sunday, May 4 | 8:00 PM to MIDNIGHT
Monday, May 5 | 8:00 PM to MIDNIGHT
Tuesday, May 6 | 10:00 PM to MIDNIGHT
Snowy Egret

REGIONAL BUSINESS MEETINGS

Grab a seat for lunch at our Regional Business Meeting!

TUESDAY, MAY 6 | 12:00 NOON

Region II in the Banyan Breezeway

Region III in the Tarpon-Sawyer Theater

NCURA REGION III OFFICERS

CHAIR
Rodney Granec
The University of West Alabama

CHAIR-ELECT
Laurianne Torres
Duke University

SECRETARY
David Smelser
University of Tennessee

TREASURER
Kay Gilstrap
Georgia State University

IMMEDIATE PAST CHAIR
Cindy Hope
University of Alabama

REGION III BOARD MEMBER
Tony Ventimiglia
Auburn University

NCURA REGION II OFFICERS

CHAIR
Leerin Shields
University of Maryland, Baltimore

CHAIR-ELECT
Jill Frankenfield
University of Maryland

SECRETARY
Charles Bartunek
Johns Hopkins University

TREASURER
Debra Murray
Georgetown University

IMMEDIATE PAST CHAIR
Brian Squilla
Thomas Jefferson University

REGION II BOARD MEMBER
Anne Albinak
Johns Hopkins University

REGION II BOARD MEMBER
Dennis Paffrath
University of Maryland, Baltimore

We extend our sincerest gratitude to all of the NCURA volunteers, Planning Committee members, Track Chairs, and Meeting Ambassadors who helped make this meeting a great success!

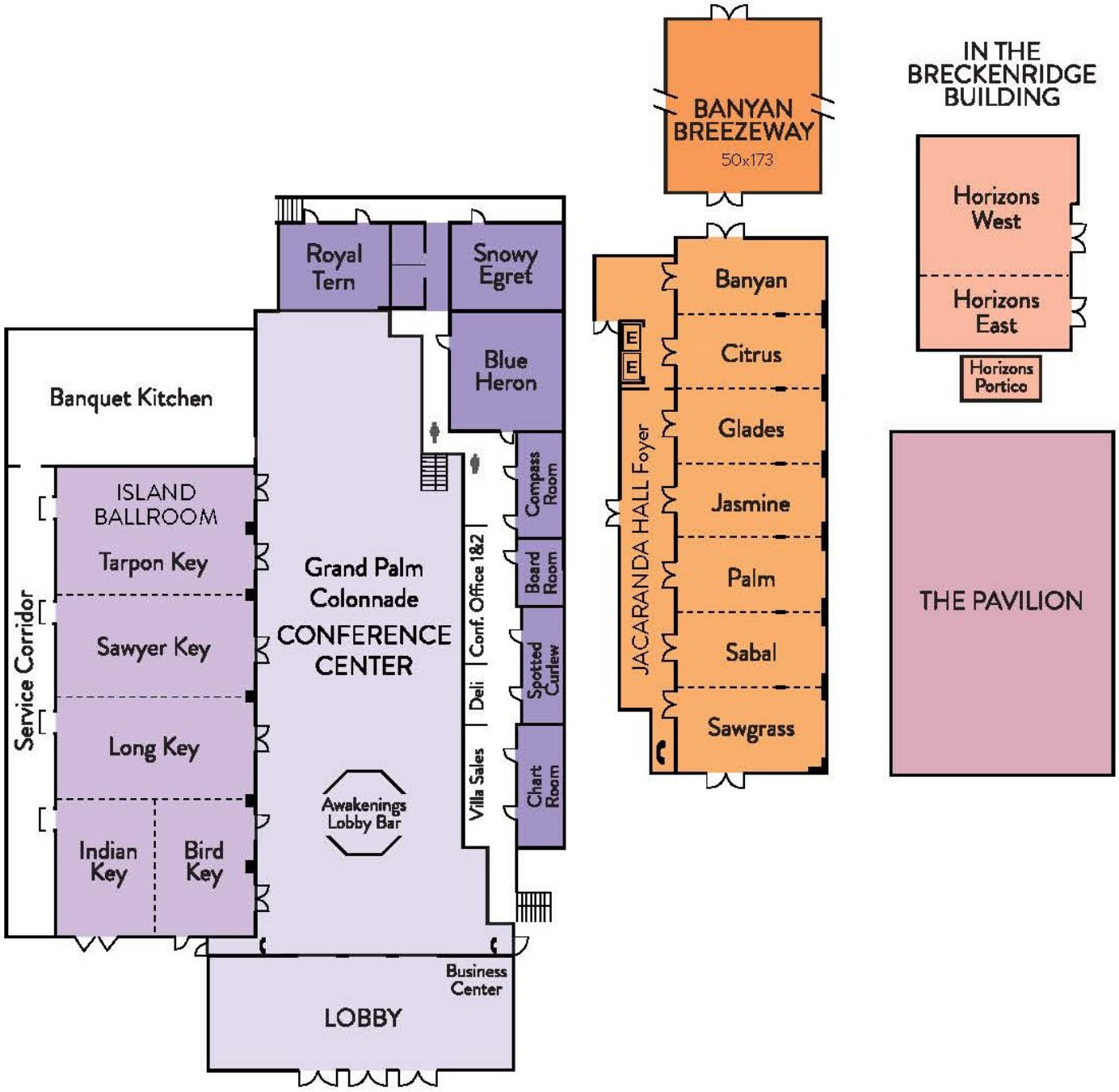
And a special THANK YOU to our workshop and session presenters for dedicating your time and talent!

PROPERTY MAP

TRADEWINDS ISLAND GRAND RESORT

FLOORPLAN

MEETING ROOMS LAYOUT
TRADEWINDS ISLAND GRAND RESORT



THANK YOU

TO THE MANY VOLUNTEERS
WHO HELPED MAKE THIS MEETING POSSIBLE!

2014 JOINT REGION II/III SPRING MEETING

PROGRAM CHAIRS / CO-CHAIRS

Erin Bailey, Region II Chair
University at Buffalo

Anne Albinak, Region II Co-Chair
Johns Hopkins University

Laurianne Torres, Region III Chair
Duke University

Kay Gilstrap, Region III Co-Chair
Georgia State University

PROGRAM COMMITTEES

Danette Boone
University of Maryland

Charles Bartunek
Johns Hopkins University

Magui Cordona
University of Baltimore

Cameron Craft
Medical University of South Carolina

James Denney
Mississippi University for Women

Nancy Dufau
Loyola University

Ted Fehskens
Johns Hopkins University

Jill Frankenfield
University of Maryland

Mary Louise Healy
Johns Hopkins University

Mary Holleran
West Virginia University

Erica Gambrell
University of Alabama

Rodney Granec
The University of West Alabama

Traci Jackson
University at Buffalo

Christie Johnson
Johns Hopkins University

Todd Leovic
Duke University

Jared Littman
St. John's University

Jereme Logan
University of Alabama, Birmingham

Danielle McElwain
University of South Carolina

Katie McKeon
University of Maryland

Alexandra Albinak McKeown
Johns Hopkins University

Tolise Miles
Children's National Medical Center

Kevin Mills
East Carolina University

Debra Murray
Georgetown University

Brigette Pfister
Virginia Commonwealth University

Rob Roy
Georgia Institute of Technology

Tim Schailey
Christiana Care Health Systems

Angela Sgroi
The College of New Jersey

Leerin Shields
University of Maryland, Baltimore

Greg Slack
Clarkson University

David Smelser
University of Tennessee

Jo Ann Smith
University of Central Florida

Brian Squilla
Thomas Jefferson University

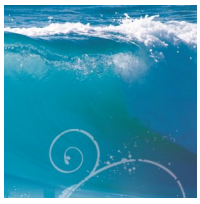
Jennifer Toll
Johns Hopkins University

Mo Valentine
University of Memphis

Pamela Whitlock
University of North Carolina, Wilmington (emeritus)

Cheryl Williams
University of Rochester

Martin Williams
William Paterson University



EXHIBITORS & SPONSORS

We would like to acknowledge the generous support of our exhibitors. Representatives from these sponsors will be exhibiting during the meeting and at break times and will be available to answer questions and provide information about their services.

Exhibits will be open Sunday through Wednesday (after breakfast).

NCURA Region II & III would like to acknowledge the generosity of our host institution
UNIVERSITY OF CENTRAL FLORIDA

Fully Online Master of
Research Administration
UNIVERSITY OF CENTRAL FLORIDA

rSmart®

guidebook

Evisions
Research Suite
Web-based Solutions

ATTAIN®
Proven Performance. Forward Thinking.

MAXIMUS®

ELSEVIER

American Appraisal®

Stratocore

infoEd® GLOBAL

UCF Stands For Opportunity®

Master of Research Administration

GRADUATE PROGRAM

Courses developed by the top Research Administrators in the country

The Master of Research Administration (M.R.A.) program at UCF provides individuals with the knowledge and skills necessary for professional advancement in the field of research administration.

Program Highlights:

- **Fully Online Delivery**
- **Cohort Model**
- **Completion in Two Years**
- **No GRE Required**

APPLY TODAY!

www.ce.ucf.edu/research

SCHOOL OF PUBLIC ADMINISTRATION
COLLEGE OF HEALTH AND PUBLIC AFFAIRS
UNIVERSITY OF CENTRAL FLORIDA