Program
National Council of University Research Administrators
Region II Spring Meeting

“Marching Through Time: The Ever-Evolving World of Research Administration”

The Eisenhower Hotel and Conference Center, Gettysburg, PA
April 22 – 25, 2012

Sunday, April 22

12:00 noon – 5:00 p.m.  Registration
1:00 p.m. – 4:30 p.m.  Workshops

Workshop 1: Proposal Writing Basics, Tips, and Tools: Helping Your Faculty Prepare Competitive Proposals

Faculty: Magui Cardona, Director of Sponsored Research, University of Baltimore; Nancy Dufau, Director, Office of Research and Sponsored Projects, Loyola University Maryland; Colleen Ebacher, Associate Professor, Towson University; Mary Louise Healy, Associate Director of Research Administration, Krieger School of Arts and Sciences, Johns Hopkins University

Program Level: Beginner to Intermediate

Pre-Requisites: Working knowledge of appropriate funding agencies and opportunities for your institution.

Description: This interactive workshop will introduce participants to the basics of proposal development and writing, and offer tips and tools for helping faculty members prepare and submit competitive proposals. Research administrators with experience in writing proposals at diverse non-research intensive institutions (public, private, small, large) will present the material. In addition, a faculty member who has led three successful U.S. Department of Education “Fulbright-Hays Group Projects Abroad” seminars will discuss her experiences in working with research administrators in preparing her successful proposals and offer advice on how best to work with your faculty. Participants will have the opportunity to review and discuss a request for proposal announcement and discuss the considerations that go into the decision as to whether or not to pursue an opportunity.

Learning Objectives: The participant will gain knowledge on how to:
- Research funding sources;
- Determine “fit” between the project idea and solicitations/programs/sponsors;
- Read and interpret a request for proposals/proposal guidelines;
- Help faculty get started on writing (and editing);
- Distinguish and develop the basic sections of a proposal;
- Write budget narratives;
- Recognize pitfalls and how to avoid them;
- Work with faculty members in preparing proposals; and
- Interpret and react to reviewers’ comments

Workshop 2: Compliance: You’re It!
Faculty: Martin Williams, Director, Office of Sponsored Programs, William Paterson University; Frank Barker, Export Control Officer, Johns Hopkins University; Anne Albinak, Senior Analyst, Finance and Sponsored Projects, Whiting School of Engineering Business Office, Johns Hopkins University

Program Level: Intermediate

Pre-Requisites: Knowledge of your University’s structure in relation to the different areas of compliance as well as the type and scope of awards your institution receives.

Description: In these days of more-for-less, many departmental and PUI research administrators are having the task of monitoring and enforcing a variety of compliance rules and regulations delegated to them. The potential breadth of areas of responsibility is staggering – ranging from employee management and antidiscrimination to the protection of living things, historic preservation to data management and dissemination, safety and security to privacy, piracy and texting to fraud and waste . . . and this is without even touching on OMB circulars. How do you decide which of these areas need to be the most closely monitored and which can be de-emphasized or even ignored? What are some ways to do that without losing track of the ones that are less important? How do you stay knowledgeable, flexible and ready to make something a priority overnight? How can you assess your current level of compliance? How do you build and uphold a strong structure for research compliance? This workshop will go into the hows, whys and what-nows of research compliance and will include examples, templates and other useful tricks and tools to help you and your office get into and stay in compliance.

Learning Objectives:
- Participants will learn about compliance from a central and departmental perspective.
- Participants will learn how to decide which issues should take priority at what times.
- Participants will learn how to apply compliance structures to their institution or department.

Workshop 3: Administering Awards through Their Life Cycle—It Takes a Village to be Compliant

Faculty: Antoinette Lawson, Director, Office of Research Administration, University of Maryland, College Park; Ann Holmes, Assistant Dean, College of Behavioral and Social Sciences, University of Maryland, College Park

Program Level: Basic

Pre-Requisites: None

Description: Have you ever wondered why so many offices are involved with a sponsored award? What role does each office play? Find out the basics by attending this workshop. This workshop will provide participants with a basic framework of sponsored projects and award management from a variety of perspectives. Participants will learn the different types of awards, including the basic tenets that are used to build the award, the governing regulations and the resulting requirements. The similarities and differences will be highlighted. At the pre-award stage, how a budget is developed, the requirements of a funding agency announcement, and the proposed award terms will differ depending on the type of award expected. At the award stage, the differences in award management will be discussed, including what is expected of a pre award administrator, a department administrator and a central administrator. The roles and responsibilities of a research administrator at all stages of the award, including proposal development, award negotiations, expenditure oversight,
deliverables, prior approval requirements, and closeout will be enumerated, compared and contrasted.

**Learning Objectives:**
- Participants will learn about the differences between a grant, cooperative agreement, and contract and the importance of understanding the differences.
- Participants will get an understanding of the roles and responsibilities of the different offices.
- Participants will learn how important the interaction among the offices is.

**Workshop 4: A Day in the Life of a Post Award Financial Administrator**

**Faculty:** Aimee Howell, Manager, Contract and Grant Accounting, University of Maryland Baltimore County; Janice Oakley, Assistant Manager, Contract and Grant Accounting, University of Maryland, College Park

**Program Level:** Intermediate

**Prerequisites:** Attendees should have some basic understanding of post award administration.

**Description:** This workshop will focus on the daily operations of a Post Award Financial Administrator and managing the many facets of sponsored projects. Discussion will focus on invoicing and collection issues as well as managing overspending on sponsored projects, cost transfers, and reasonable, allowable & allocable costs. You will also learn how to prepare for a review or audit of these same issues and much more. Come join us for a lively discussion on the challenges and lessons learned.

**Learning Objectives:**
- Participants will acquire information and techniques to effectively manage the day-to-day activities of post award sponsored projects.
- Participants will examine the roles and responsibilities of key stakeholders in post award administration.

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5:00 p.m. – 7:00 p.m.  **Welcome Reception and Recognizing New Members**

7:00 p.m. – 9:00 p.m.  **Dinner Groups**

8:00 p.m. – 11:00 p.m.  **Hospitality Suite open**

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**Monday, April 23**

7:30 a.m. – 5:00 p.m.  **Registration**

7:30 a.m. – 8:30 a.m.  **Breakfast**

8:30 a.m. – 10:00 a.m.  **Welcome:** Jared Littman, Region II Chair, Jill A. Frankenfield, Spring Meeting Committee Chair

**Plenary Session:** Cheryl-Lee Howard, Assistant Provost for Research Administration, Johns Hopkins University. Cheryl will be discussing the ever evolving world of research administration – where we’ve been as a profession, where we are, where we can expect to be in the future.
10:00 a.m. – 10:15 a.m.  Break

10:15 a.m. – 11:45 a.m.  Concurrent Sessions and Discussion Groups

Spending Federal Contract Funds – What You Need to Know - Small and Minority Owned Business Subcontracting Compliance

**Presenters:** Antoinette Lawson, Director, Office of Research Administration, University of Maryland, College Park; Mary Ann Zimmerman, Assistant Director, Procurement & Supply, University of Maryland, College Park

**Program Track:** Departmental

**Program Level:** Beginner

**Description:** Universities receive millions of dollars in Federal contracts and subcontracts for research and scholarly activities. An important federal requirement in these contracts is to provide opportunities for small and minority owned businesses to participate in providing goods and services to fulfill contract obligations. This session will focus on federal contracting and the required small business subcontracting plans and reporting.

**Learning Objectives:**
- The requirements for federal contracts subcontracting plans: what they are and when they’re required.
- Setting Subcontracting Goals for a federal contract, meeting those Goals, reporting the efforts to meet those Goals.
- Roles and responsibilities of Principal Investigators, Central Administration, Departmental Administrators, Procurement and Supply.

When Pre-Award Dreams Become Post-Award Nightmares

**Moderator:** Jillian Cawley, Assistant Director of Grants Development, Richard Stockton College of New Jersey

**Presenters:** Heather Wilson, Grant Accounting and Compliance Specialist, Towson University; Charlene Wysocki, Grant Coordinator, Ursinus College; Nancy Ball, Director of Sponsored Programs, Lafayette College; Vicki Giammarco, Associate Controller, Ursinus College; Andrew Fitzpatrick, Financial Analyst, Richard Stockton College of New Jersey

**Program Track:** PUI

**Program Level:** Basic/Intermediate

**Description:** Using real examples, this interactive session will touch on just some of the ways we inadvertently cause post-award issues at the pre-award stage and will offer tips and best practices for bridging the divide between the pre- and post-award functions. The following is a sampling of the problematic areas in budgeting and contracting that will be discussed in this session: the relationship between programmatic activities and budgets, multi-PI projects, cost-share arrangements, salaried employees vs. consultants vs. subawards, indirect costs budgeted as direct costs, progress and financial reporting terms, payment provisions, procurement, applicable regulations, prior approval and rebudgeting conditions. Presenters will ask the session participants to offer their own experiences with pre-award practices that have proven problematic for post-award management and the methods/processes they have used to smooth the pre- to post-award transition.

**Learning Objectives:**
- Participants will be able to recognize and mitigate potential post-award problems by looking at proposal budgets and contract terms and conditions.

The Benefits of an Electronic Document System
Presenters: Thomas Berkhoudt, Director, Department of Psychiatry, University of Pittsburgh; Mark Howard, Data Team Leader, Department of Psychiatry, University of Pittsburgh; Mariana Rieke, Post Award Team Leader, Department of Psychiatry, University of Pittsburgh

Program Track: Departmental

Program Level: Intermediate

Description: This session will focus on how departmental administrators can create and implement an electronic document system for the grants they manage. Topics covered will include what administrators need to plan for when designing an electronic document system so documents are easy to locate within the document system architecture.

Learning Objectives:
- What do administrators need to plan for when designing an electronic document system so documents are easy to locate within the document system architecture?
- What are the benefits of an electronic document system for pre- and post-award?

Cost Sharing - The Gift that Keeps on Giving
Presenter: Ann Holmes, Assistant Dean, College of Behavioral and Social Sciences, University of Maryland, College Park

Program Track: Post-Award

Program Level: Intermediate

Prerequisites: Participants should have some knowledge of cost sharing

Description: Cost sharing always seems like a good idea when the principal investigator is putting the proposal together. But is it really? Does our willingness to help pay part of the costs of the research really improve our chances for winning the funding? Sometimes it is hard to tell what, if any, advantages we gain when we agree to cost sharing. Understanding what a commitment of cost sharing really "costs" your institution is a vital first step in helping you to evaluate the risks and rewards of making the decision to cost share. This session will review some of the basics of cost sharing, its effect on the F&A rate, and lead to a discussion on the administrative burdens of tracking cost sharing commitments. Case studies will be used to demonstrate important points.

Learning Objectives:
- Participants will review the basics of cost sharing and understand the various forms it can take.
- Participants will understand the impacts of these commitments in both time and money on the institution.
- Participants will gain an understanding of what documentation is required to prove cost sharing commitments were met, if asked in an audit.

Non-Federal Agreements Negotiations: Techniques & Tactics
Presenter: Adriel Villegas-Estrada, Senior Grants and Contracts Specialist, Weill Medical College of Cornell University

Program Track: Pre-Award

Program Level: Basic

Description: While non-federal contract negotiation varies between institutions depending on policies and procedures, many of the principles and thought processes are identical between institutions - minimize risk while obtaining the best deal possible for the institution and investigator. This session will focus on providing those with beginner and intermediate experience tools towards successful negotiation of agreements with non-federal non-profit organizations both domestic and international. It will help delineate a decision-making thought process, identify problematic language and investigate alternative language and
solutions. The session will be interactive and will use TurningPoint Technologies to gauge responses and also learn what other institutions participating in the session current practices are.

**Learning Objectives:**
- Help establish a decision making tree for how agreements are negotiated.
- Identify problematic language and solutions.

11:45 a.m. – 1:00 p.m.  
**Luncheon**

1:00 p.m. – 2:30 p.m.  
**Concurrent Sessions and Discussion Groups**

**Subaward Risk Assessment: The What? & The Why?**

**Presenters:** Antoinette Lawson, Director, Office of Research Administration, University of Maryland, College Park; Jeff Snider, Director of Administrative Services, Department of Astronomy, University of Maryland, College Park

**Program Track:** Departmental

**Program Level:** Intermediate

**Description:** Subrecipient monitoring and conducting risk assessments can be a labor intensive task often consuming a lot of time when you don’t have much time to issue the subaward. What is done for subrecipient monitoring at our institutions depends on culture and available resources. In this session, we will explore the federal requirements, why they’re required and who is responsible for subrecipient monitoring at our institutions. As a department administrator, how do you help facilitate the subaward process for your researchers? Why does it take so long to issue subawards? It’s all about risk management.

**Learning Objectives:**
Participants will:
- Learn the minimum requirements for subrecipient monitoring.
- Explore different options for subrecipient monitoring.
- Examine subrecipient monitoring tools.

**Internal Control Environment and You**

**Presenters:** Lennie Carter, Associate Vice President; Financial Affairs, Georgetown University; Jason R. Ackerman, Chief Audit Executive, Internal Audits, Georgetown University; James L. Reisert, Director of Sponsored Programs Financial Operations, Georgetown University

**Program Track:** General

**Program Level:** Intermediate

**Description:** A university’s internal control environment consists of all policies, procedures, instructions, and management directives to which personnel must conform when performing tasks. A university puts controls into place to prevent losses arising from regulatory actions, lawsuits, errors or fraud. Given that regulatory and compliance requirements are constantly changing, it is essential that all employees that work in any financial or compliance area of a university develop and participate in a strong internal control environment.

**Learning Objectives:**
- Participants will be able to identify controls and risks.
- Participants will be able to develop and implement a control environment for cost transfers, effort reporting, ProCards and AmEx, CSRs, overdrafts, sub-recipient monitoring and technical and financial reports.
- Participants will be able to assist in fraud detection and reporting.
- Participants will be able to understand the importance of setting and evaluating internal controls in their areas.
Participants will be able to review case studies to assist them with this process.

Export Controls – What the Pre-Award Office Needs to Look For (Red Flags)

**Presenter:** Frank W. Barker, Export Control Officer, Johns Hopkins University
**Program Track:** Pre-Award
**Program Level:** Beginner
**Description:** The United States Government has become quite interested in what American universities are doing in foreign countries and with their citizens, even when foreign persons are studying and working at our universities on valid visas. Several bodies of federal regulation describe transactions that we cannot enter into with certain foreign countries or foreign nationals without asking for permission to do so. Examples of such transactions would be sending particular scientific equipment to certain countries (even temporarily), or enabling a foreign national to independently develop such equipment. The best way to ensure compliance with these regulations (often referred to as “export control regulations”) is by anticipating potential violations when reviewing proposals and funding announcements, and then by following up with a review of award terms. This session will direct your attention to project descriptions, announcement language and award terms that are often associated with export control issues and will allow you to address them before they have a chance to develop into violations of the export control regulations.

**Learning Objectives:**
- Participants will be provided with examples of situations and language that are often associated with export control issues.
- Participants will be provided with examples of ways that might reduce problems and ensure compliance when an award is received.

Pre-award and Post-Award Systems and Guidelines for Departmental Research Administrators

**Presenters:** Erin E. Bailey, Center Manager and Senior Research Administrator, University of Buffalo; Danielle Brown, Manager, Sponsored Program Administration, University of Maryland Baltimore; Tim Schailey, Manager Sponsored Programs, Children’s Hospital of Philadelphia
**Program Track:** Departmental
**Program Level:** Beginner
**Description:** The purpose of this session is to introduce the various aspects involved in departmental administration including preparation and review of proposals, budget preparation, and electronic proposal submission, differences between grants, contracts, and other common agreements, and relevant compliance issues. This session will offer an understanding of departmental research administration practices in pre-award and post-award, the tools to use, and the "plans" to follow. Just as the "Battle of Gettysburg" required strategic thinking by its administrators, pre-award also requires building a foundation and maintaining a solid structure. The departmental administrator must have the knowledge and understanding of the pre-award and post-award processes to ensure that their department will not crumble if "under attack," how to juggle workloads, deadlines and the occasional "barrier" that may be put in their path. This session will cover the basic principles for pre-award and post-award departmental research administration practices; case studies; and provide departmental administrators with key information "march" forward with success.

**Learning Objectives:**
- How to identify funding.
- The elements to proposal submission.
- Provide case studies for participant involvement.
• Identify the various types of agreements that fund projects.
• Compliance and post award administration.
• Provide participants with an understanding of the basic elements of the pre and post award cycle.

Daily Management of Awards
Presenter: Shari Swisher, Director, Sponsored Projects Accounting & Compliance, University of Maryland, Baltimore
Program Track: Post-Award
Program Level: Intermediate
Description: What does it take to manage an award? Do you have knowledge of cost transfers, salary reallocations or even what Circular helps you in managing your contract and grant awards? This session will provide you with the ability to assess how you're handling your award management and give you tips and tricks to help guide you.
Learning Objectives:
• What federal regulations will help guide you.
• What are successful award managers doing that you might not be doing.

2:30 p.m. – 2:45 p.m. Break

2:45 p.m. – 3:55 p.m. Concurrent Sessions and Discussion Groups

Hot Topics in Post-Award
Presenter: Carmen Morrison, Office of Grant and Contract Accounting, University of Maryland, College
Program Track: Post-Award
Program Level: Beginner
Description: Details Coming Soon

Clinical Trial Basics: Components and Responsibilities
Presenters: Cyndi Campbell, Research Administrator, Georgetown-Howard Universities Clinical Translational Science Award, Georgetown University Medical Center; Aida Manu, Project Coordinator, Division of Rheumatology, Georgetown University Medical Center; Emily Semmel, Clinical Study Coordinator, Division of Rheumatology, Coordinator, Georgetown University Medical Center
Program Track: Medical/Clinical
Program Level: Basic
Description: Your faculty is showing an interest in clinical trials. What do you do? Don’t panic, your institution’s central offices are ready to help. We hope. In this session you will learn about confidentiality agreements, who negotiates and signs them and how they relate to the actual clinical trial agreement (CTA). You will learn the importance of timing. When should you start working on the budget, preparing the submission to your IRB and sending the CTA to your clinical trials/sponsored programs office? And most important you will learn who you can turn to for help. We will discuss the standard issues and possible pitfalls of clinical trials and learn basic best practices. Every aspect of sponsored programs is getting more and more complicated. Clinical trials are no exception. In this overview, we will cover the basic building blocks of clinical trial development, management and closeout. Attendance at this session will give you the basic information for the neophyte clinical trial administrator or coordinator.
Learning Objectives:
• You will learn tips for budget development;
• Timing of IRB submission;
• How to work with your central offices to move the clinical trial forward.

Increasing Complexity in the World of Subagreements
Presenter: Debra Brodlie, Senior Contracts Associate, Johns Hopkins University, Bloomberg School of Public Health
Program Track: Pre-Award
Program Level: Intermediate
Description: Subagreements today have multiple layers of compliance hurdles to deal with; new laws require careful language crafting regarding conflict of interest, export control, transparency act, cost and pricing terms, FISMA, etc. This workshop will share some of the basics in creating Subagreements while outlining major topics which must also be dealt with now. Guidelines and Outlines for crafting Substantive Subagreements which meet audit scrutiny and which deal with difficult topics such as international collaborations, new federal regulations and greater complexity of issues.
Learning Objectives:
• Encourage attendees to think creatively about different ways of approaching IP negotiations.
• Discuss whether a system can be developed that would allow colleges and universities to manage the risks associated with accepting publication restrictions and foreign national restrictions.
• Establish a forum for debating and discussing other non-traditional approaches to standard contract provisions.

IP Management at PUIs
Presenter: Jose Ulises Toledo, Associate Dean for Administration, West Virginia State University
Program Track: PUI
Program Level: Intermediate
Description: The management of IP, especially at PUIs, appears to be at different developmental stages. This discussion group intends to provide the basics of IP and tips for implementing and updating IP policies. It will also provide a vehicle to gauge where PUIs are in terms of IP Management.

Managing Academic Research Service Centers
Presenters: Mary Beth Curtin, Associate Director, Small Scale Systems Integration & Packaging Center, Binghamton University, State University of New York; Martin B. Smith, III, Manager, Higher Education and Academic Medical Centers, Attain, LLC
Program Track: General
Program Level: Intermediate
Description: Academic Research Service Centers provide the use of specialized equipment and services to the university research community. These facilities usually reside within a university department or research center, and are typically funded by a combination of department/center funds, infrastructure grants, and revenue collected from services provided to users. The successful operation of these facilities requires a management program that includes the implementation of standard business practices that address complex personnel, billing, collection, and accounting issues. Participants of this intermediate level session will gain an understanding of specialized service centers and university policies in this area. Topics to be covered include: considerations when setting up and operating a service center, including monitoring and oversight; problems and solutions related to the formation and operation of service centers; identification of common mistakes that occur when developing rates and best practices for rate calculation; ideas on how to implement processes and procedures for effective
oversight of service centers; approval of service center rates; and ideas on marketing these centers. A case study from a university multi-user laboratory will provide an opportunity for discussion.

Learning Objectives:
- Participants will gain an understanding of specialized service centers and university policies in this area.
- Participants will understand the many components of a successful business program relating to shared facilities, including compliance, finance, and operations.
- Participants will gain insight into the components important in establishing recharge rates.

4:00 p.m. – 5:00 p.m.

Concurrent Sessions and Discussion Groups

Disability as Diversity in Federal Proposals: Competitive Considerations
Presenter: Christine Katsapis, Director, Office of Sponsored Programs, Gallaudet University
Program Track: Pre-Award/ General
Program Level: Beginner
Description: Today disability is broadly defined because of the multi-dimensional aspects of an individual's experience of disability. A change in perspective by research administrators is also in order. When working with PIs it is important to shift from viewing disability as an accessibility issue to a competitive and diversity issue. This session will explore the nature of disability in relationship to federal grant proposals. It will cover the major considerations that must be made when planning a project and give examples of agency language that covers inclusion of people with disabilities on federally funded projects.
Learning Objectives:
- Participants will learn up-to-date information about disability types and changes to that population
- Participants will understand the major considerations that must be addressed in order to successfully include individuals with disabilities in a project
- Participants will gain insight into the new ways that federal agencies are increasing the inclusion of people with disabilities into their funding

Hot Topics in Pre-Award
Presenters: Holly Benze, Director, Johns Hopkins University; Marge Trefill, Contracts Associate, Johns Hopkins University
Program Track: Pre-Award
Program Level: All
Description: The internet has made it very easy for agencies to change their policies and guidelines. Keeping current with all these changes at your institution isn't so easy. This session will focus on recent revisions to agency guidelines or policies. Some of the topics that may be discussed are NIH's new salary cap and how different institutions are handling that, NIH's new conflict of interest policy, Fly America Act, FFATA, NSF's data management plan requirement, target areas that Federal auditors are looking at, non-allowable charges for conferences, and any other topics that arise by April or of a concern to you.
Learning Objectives:
- Participants will raise any issues that have recently popped up and discuss with the others to see how they have solved the problems or what steps they are taking to address the issue.
Using Advisory Committees at a PUI to Help Grow a Grant-Seeking Culture
Presenter: Angela Sgroi, Director of Grant Operations, The College of New Jersey
Program Track: PUI
Program Level: Intermediate
Description: How do PUI research administrators create the irresistible urge in our faculty and staff to see and win grants to support their research and academic projects? How can we bring about a culture of grantsmanship and a love of the chase for funding? If you have tried to, or even wondered about developing and working with a campus stakeholder advisory committee to help expand, enhance, and affirm grants office initiatives to grow the grant-seeking enterprise at your PUI, this this is the Discussion Group for you. Please bring all of your best ideas, successes, challenges, and lessons learned.

Building a Research Program One CRA at a Time
Presenters: Mary Glasscock, Assistant Vice President and Chief Business Officer, Georgetown University Medical Center; Clairice Lloyd, Senior Grants & Contracts Manager, Office of Sponsored Research, Georgetown University; Tolise Miles, Senior Administrator, Biomedical Graduate Program Organization, Georgetown University
Program Track: General/Senior
Program Level: All
Description: This session will provide information on how to create a learning platform for aspiring Certified Research Administrators (CRA). It will introduce strategic marketing to administrators; building a classroom syllabi, incorporating Central Administration into the teaching process and preparing participants for the CRA exam. This session will focus on promoting CRA designations that will create a win-win, not just for the individual, but for the research community as a whole.

Learning Objectives:
• Setting up a CRA review class;
• Assessing the skills of the CRA candidate;
• Creating study techniques;
• Utilizing resources to fund a CRA program.

Collections: “Show Me the Money”
Presenter: Janice Oakley, Manager, Contract and Grant Accounting, University of Maryland College Park
Program Track: Post-Award
Program Level: All Levels
Description: In this discussion group, participants will identify steps they can take to eliminate the risk of not receiving payment for work successfully completed. Participants will learn to identify and avoid non-payment situations and learn techniques for successful resolution of non-payment issues.

5:30 p.m. – 10:00 p.m.
Monday Night Event – The Carriage House Inn, Emmitsburg, MD
Transportation will be provided to The Carriage House Inn for Dinner. After dinner we will be joined by Joe Kerrigan – Actor, Professional Storyteller, Author, Entertainer, & Owner of GHOSTLY TALES OF GETTYSBURG FIRESIDE STORIES. Joe will be performing, weaving Gettysburg's history with the highly entertaining Ghost Stories from his book series.
Tuesday, April 24

7:30 a.m. – 5:00 p.m.  Registration

7:30 a.m. – 8:30 a.m.  Continental Breakfast

8:30 a.m. – 9:25 a.m.  Business Meeting (Special Guest: NCURA President, Dan Nordquist) and Presentation of Distinguished Service Awards

9:30 a.m. – 10:45 a.m.  Concurrent Sessions and Discussion Groups

Pre-Award and Post-Award – Merging Forward for Success
Presenters: Clairice Lloyd, Grants and Contracts Manager, Office of Sponsored Research, Georgetown University; Tolise Miles, Senior Administrator, Biomedical Graduate Research Organization, Georgetown University; Debra Murray, Assistant Director, Sponsored Projects Compliance, Georgetown University
Program Track: Departmental
Program Level: Intermediate
Description: This session 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 verses service agreement; and cost sharing. This session will also focus on preparing financial status reports, closeout of awards, cost transfers, allowable and allocable costs and much more. 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.
Learning Objectives:
• Introduce techniques to assist with pre-award administration.
• How to assist faculty with the proposal process.
• Provide financial tools to effectively manage funded awards.
• Avoiding the loop holes in post-award administration.

IP Management
Presenters: Greg Slack, Director of Research and Technology Transfer, Clarkson University; George McGuire, Patent Attorney, Bond, Schoeneck and King; Blaine T. Bettinger, Associate, Intellectual Property Group, Bond, Schoeneck and King
Program Track: General/Senior
Program Level: Senior
Description: 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 for the university in support of these economic development activities, while growing
research. Often the expectations of both parties are in conflict with each other, the university policies and federal restrictions that universities granting IP rights must consider. This session focuses on the many challenges facing research administrator who manage intellectual property and negotiate private industrial research agreements and state and federal awards.

**Learning Objectives:**
- The obstacles to colleges and universities prospectively granting intellectual property rights to inventions resulting from sponsored research.
- Approaches to negotiating IP rights for sponsored research.
- The Uniform Biological Materials Transfer Agreement (MTAs) Definitions and IP Ownership

**Communication Strategies: How to Get News Out—and Read**
**Moderator:** Anne Albinak, Senior Analyst, Finance and Sponsored Projects, Whiting School of Engineering Business Office, Johns Hopkins University
**Presenters:** Charles Bartunek, Contracts Associate, Johns Hopkins Bloomberg School of Public Health; Kathryn Magrogan, Administrative Coordinator, Johns Hopkins Bloomberg School of Public Health

**Program Track:** Pre-Award
**Program Level:** All Levels
**Description:** Web sites, newsletters, annual reports, email correspondence: what’s the best way to get the word out about funding opportunities, new/changing regulations, new policies, and successes in funding? How do we ensure that current information is always available and that our message isn’t being ignored? Join us to learn what kinds of strategies are being used and how these might be adapted to your office/school/university.

**Learning Objectives:**
- The session will identify common techniques in modern communication
- Participants will learn how other Universities are using these tools
- Participants will learn how they can use/adapt these tools & techniques for their office

**Managing Change from Different Rungs on the Career Ladder**
**Presenters:** Amanda Snyder, Assistant Director, Sponsored Programs Administration, University of Maryland, Baltimore, Alexandra McKeown, Associate Dean for Research Administration, Johns Hopkins Bloomberg School of Public Health

**Program Track:** General
**Program Level:** Intermediate
**Description:** Effectively managing change requires similar qualities at all levels of the career ladder; however, the experience IS different depending upon your current rung. This session will explore change management skills in general, then will branch out to focus on the different perspectives of staff, management, and senior management, giving examples of best practices for each level. Additionally, we will discuss differences in perception and strategies for when the change is mandated by an outside source vs. when it comes from within the organization.

**Learning Objectives:**
- Expand knowledge of general best practices for managing change.
- Better understanding of unique perspectives from different levels of the career ladder.

**Internal Grants and Research Administration at a PUI**
**Presenter:** Nancy Dufau, Director, Office of Research and Sponsored Projects, Loyola University Maryland
Program Track: PUI  
Program Level: Basic/Intermediate  
Description: A particular charge for research administrators at PUIs often includes developing faculty interest and skill in applying for and winning grants. Often internal grant program administration is assigned to the research administration professionals at PUIs. This discussion group will consider the question of whether internal grants programs are a helpful to research administrators in achieving their goals, or if they are self-defeating. Discussants will share how these opportunities and/or challenges are addressed at their institutions.

10:45 a.m. – 11:00 a.m. Break

11:00 a.m. – 12:15 p.m. Concurrent Sessions and Discussion Groups

Creative Contracting: How to Make Dangerous Deals in Desperate Times  
Presenters: John Hanold, Senior Associate Director, Office of Sponsored Programs, The Pennsylvania State University; Thomas F. Burns, Senior Contracts Associate, Johns Hopkins Bloomberg School of Public Health  
Program Track: Pre-Award/Senior  
Program Level: Senior  
Description: During these tough financial times, it has become common for university leaders to call for renewed flexibility and creative approaches to seeking out non-traditional funding sources. Are university contract offices prepared to challenge their existing dogmas? Can we concede publication rights under certain circumstances? Can we grant IP ownership to our sponsors? Can we pre-negotiate royalties? Can we approach confidentiality, liability issues, and non-standard payment clauses in creative ways? Many colleges and universities have very good reasons for establishing lines that we rarely (or never) cross, but it is a healthy exercise for us to question whether we’ve drawn these lines in the right places, and whether exceptional circumstances might sometimes warrant exceptional terms.  
Learning Objectives:
- To review critical issues associated with publication restrictions, intellectual property, and other contractual issues  
- To consider possible novel approaches for dealing with challenges in these areas.  
- To consider whether there are any lines that should never be crossed in university contract negotiations, regardless of how lucrative or exciting the funding opportunities may be.

Training PUI Faculty for Success: How to Psych Them Up Without Psyching Them Out  
Presenters: Jillian Cawley, Assistant Director of Grants Development, Richard Stockton College of New Jersey; Jennifer Toll, Grant & Contract Administrator, Towson University  
Program Track: PUI  
Program Level: Intermediate  
Description: Prior NCURA sessions have suggested training and workshops as a vital component of cultivating a research subculture, but few have addressed the practicalities of developing and delivering such training programs. This concurrent session will address effective methods, techniques, and tips for providing grantsmanship training tailored to faculty at PUIs, based on the experience of actual Region II research administrators. Drawing from the real experiences and best practices in grants development, this interactive session
will explore PUIs’ evolving efforts to make grant seeking and writing both attractive and accessible to faculty. This would include general workshop ideas regarding format, speakers, and exercises, as well as general help with presentation styles and public speaking. The session will offer tips and “lessons learned” from administrators experienced in developing and presenting a variety of training programs to PUI faculty, including a summer proposal writing workshop that provides faculty at a non-research institution with the focused, hands-on training required to develop a competitive proposal for external funding. It will also offer insights on developing senior faculty as mentors in grant seeking as well as other strategies to engage faculty as resources in scholarly activity and nurturing a research subculture at PUIs. Come ready to share the innovative training and development ideas that your PUI is implementing! Note that a complementary discussion group will be moderated by the presenters of this session, to provide an informal setting to network with other Region II attendees and establish a Guest Speaker’s Consortium.

**Learning Objectives:**
- Participants will be able to identify strategies and techniques for conducting proposal development training within the context of a predominantly undergraduate institution.
- Participants will develop skills in presenting and public speaking.

**Managing through Barriers to Success: Debunking the "Urban Legends" to Achieve Compliance and Productivity!**

**Presenters:** Martin B. Smith, III, Manager, Higher Education and Academic Medical Centers, Attain, LLC; Brian Squilla, Chief of Staff, Office of the Dean, Jefferson Medical College, Thomas Jefferson University

**Program Track:** General

**Program Level:** Intermediate

**Description:** This session will explore 1) the challenge areas (effort, cost transfers, subrecipient monitoring and service centers, 2) the popular "urban legends" or typical myths that stood in our way, and 3) conclude with how we achieved success by breaking down those barriers and changing perspectives.

**Learning Objectives:**
- Identifying bottlenecks to productivity and barriers to financial compliance success;
- Strategies for mitigating risk at the department level; and
- Solutions for working with people to achieve gains in productivity that can be employed at any institution.

**NSF’s New Award Cash Management System (ACM$)**

**Presenters:** Denise Robinson, Alisha Williams, Ilene Caruso, National Science Foundation, Division of Financial Management, Grantee Cash Management Section

**Program Track:** Federal

**Program Level:** Intermediate

**Description:** This session will discuss the new service NSF will be implementing for awardee payments and reporting in the near future. Attendees will hear from presenters who have been directly involved with the development activities and have the opportunity to ask questions about how this change may impact their organizations. This session will provide a first look at the new service and information regarding the reconciliation process that will occur prior to implementation.

**Learning Objectives:**
- Participants will gain an understanding of why NSF will be changing how awardees request payments;
• Participants will learn what will be required to report and request payments in the future;
• Participants will be better prepared for the upcoming reconciliation and transition activities.

Financial Compliance: Why Are Departments at Risk?
Presenters: Katherine Calvin, Senior Financial Manager, Financial Operations, Johns Hopkins Bloomberg School of Public Health; Debra Murray, Assistant Director, Sponsored Projects Compliance, Georgetown University
Program Track: Departmental/Post-Award
Program Level: Intermediate
Description: Department administrators are often presented with ethical issues, by their faculty members, that forced them to balance getting the job done while being compliant. Specific topics that will be discussed are cost allocation, cost transfers, financial oversight and internal controls. This discussion group will discuss the key risks in sponsored compliance, grant accounting and financial management at the departmental level.
Learning Objectives:
• Department administrators will learn how to productively manage sponsored awards while adhering to financial compliance requirements.

12:15 p.m. – 1:15 p.m. Luncheon
1:15 p.m. – 2:45 p.m. Plenary Session: “Gettysburg: The Symbolic Heart of America”
Stephen Hansen, Ph.D., Professor of History, Southern Illinois University at Edwardsville, Noted Lincoln Historian, Past NCURA President, and 2005 NCURA Outstanding Achievement in Research Administration Recipient
2:45 p.m. – 3:00 p.m. Break
3:00 p.m. – 4:10 p.m. Concurrent Sessions and Discussion Groups

Let’s Start at the Beginning: The Clinical Trial Pre-Award Process
Presenters: Carlos Braxton, Senior Grants and Contracts Associate, Johns Hopkins School of Medicine; Tom Burns, Senior Grants and Contracts Associate, Johns Hopkins Bloomberg School of Public Health; Karen Roz, Associate Director, Clinical Research Support Services, Johns Hopkins University
Program Track: Medical/Clinical
Program Level: Intermediate
Description: A panel discussion on pre-award planning and administration of clinical trials from department and research administration office perspectives.
Learning Objectives:
• To facilitate a discussion of the various aspects of clinical trial pre-award process including budget development, IRB protocol submission and negotiating contracts.

Understanding the Agency Review Process
Presenter: Marjorie Piechowski, Director of Research Support, University of Wisconsin-Milwaukee
Program Track: Pre-Award
Program Level: Intermediate
Description: Part of the strategy for successful grant applications is understanding how the review process works and tailoring the applications for that process. This session will cover the similarities and differences in the review process at major federal agencies, the steps in the review process, how reviewers are selected, what reviewers look for in successful proposals, how to become a reviewer, and why research administrators can benefit personally and professionally from serving as a reviewer.

Learning Objectives:
- Participants will be able to describe the selection of reviewers and the review process at major federal grant agencies.
- Participants will be able to apply knowledge of the review process to develop effective, successful proposals.
- Participants will be able to understand the benefits of becoming a reviewer for the individual and the institution.

Advancing the IRB Agenda at PUIs: Successful Tools and Strategies
Moderator: Magui Cardona, Director of Sponsored Research, University of Baltimore
Presenter: Tania Johnson, Assistant Director, Corporate, Foundation, and Government Relations, Swarthmore College
Program Track: PUI
Program Level: Intermediate
Description: In an era of fiscal anxiety, how can we as research administrators or IRB administrators convince our institutions to provide additional resources to our Institutional Review Boards? How can we provide the case-building information necessary to empower decision makers to secure these funds for greater support for human subjects research protections? In the meantime, how do we make the most of the current constraints that we may currently face? Join fellow administrators at PUIs to hear successful strategies that worked at one institution and brainstorm new ideas in this ever-evolving area of research administration.

Learning Objectives
- Learn to create processes and structures that will enable you to make data-based recommendations to senior administrators.
- Learn to make the case for increased IRB resources in different ways for different audiences.
- Learn how to build coalitions of support across your institution.

NIH Update
Presenter: Marcia L. Hahn, Director, Division of Grants Policy, Office of Policy for Extramural Research Administration, OER, NIH, DHHS
Program Track: Federal
Program Level: All
Description: This session covers the latest news from the National Institutes of Health including budget information, current policy topics, policy reminders, and updates on NIH eRA activities.

Troublesome DFAR Clauses Concerning Export Control
Presenters: Cheryl George, Export Compliance Officer, The Pennsylvania State University; Stacey Bucha, Senior Negotiator, The Pennsylvania State University
Program Track: Senior
Program Level: Intermediate
Description: There are several DFAR clauses placed in an award that remove the Fundamental Research Exemption and then requires the project to be reviewed for export control concerns. The DFAR 252.204-7000 "Disclosure of
Information” clause, as well as the impending insertion of the DFAR 252.204-70XX & 70YY clauses, and the importance of understanding the clauses and how to negotiate with the sponsor.

**Learning Objectives:**
- Understand the DFARs related to export control.
- Discuss techniques on how to negotiate.
- Address the implications if the removal request was not successful.

4:15 p.m. – 5:15 p.m.

**Concurrent Sessions and Discussion Groups**

**Creative Contracting: How to Make Dangerous Deals in Desperate Times**
**Presenters:** John Hanold, Senior Associate Director, Office of Sponsored Programs, The Pennsylvania State University; Thomas F. Burns, Senior Contract Administrator, Johns Hopkins Bloomberg School of Public Health
**Program Track:** Pre-Award
**Program Level:** All
**Description:** This is a follow-up discussion group to the concurrent session with the same title. Attendees will be able to ask more in-depth questions about creative contracting issues that have arisen in their institutions and get potential solutions from the presenters as well as the audience. Discussion topics might include: intellectual property terms, publication terms, IDIQ contracts, etc.

**Learning Objectives:**
- Participants will be able to discuss specific questions about issues they might be having at their institutions and get feedback on potential solutions.

**Research Administrator Guest Speaker’s Consortia Meet and Greet**
**Presenters:** Jennifer Toll, Grant and Contract Administrator, Towson University; Jillian Cawley, Assistant Director of Grants Development, Richard Stockton College of New Jersey
**Program Track:** PUI
**Program Level:** Intermediate
**Description:** The success of a grantsmanship workshop depends greatly on the speakers, and outside guest speakers often command attention where a familiar face does not. This session provides a networking space for research administrators who are willing to present workshops at other regional institutions as well as host their peers as guest speakers on their campuses. Focus will be on forming regional groups of administrators who can trade contact information and explore the idea of trading workshops back and forth to provide attractive grantsmanship programming for their faculty, particularly in the PUI track. This session will be of particular interest to those who attended the session, “Training PUI Faculty for Success: How to Psych Them Up Without Psyching Them Out.” This session provides a networking space for research administrators who are willing to present workshops at other regional institutions as well as host their peers as guest speakers on their campuses. Focus will be on forming regional groups of administrators who can trade contact information and explore the idea of trading workshops back and forth to provide attractive grantsmanship programming for their faculty, particularly in the PUI track.

**Training Grants: I Got One, Now What Do I Do?**
**Presenters:** Matt Miller, Senior Financial Analyst, Johns Hopkins University; Cheryl K. Williams, Assistant Director, Office of Research and Project Administration, University of Rochester
**Program Track:** Departmental
Program Level: Intermediate
Description: Let’s face it: There is simply not enough time at any meeting in either a workshop or a session to begin to scratch the surface of training grants. They are the most detailed, complicated, difficult to manage, ulcer-producing grants available. Any talk about the amount of information that must be tracked, the annual close-out misery, the constant updating of on-going information, the comings and goings of trainees, can only be handled in the controlled atmosphere of a professional discussion group where questions are carefully considered and thoughtful answers provided. Whether or not that happens here will be up to you. We will start out with a top ten questions/problems associated with training grants and move on from there. It’s a discussion group so bring your training grant horror stories/solutions with you.

Learning Objectives:
- Participants will be able to share experiences and obtain tips and tools to better manage their training grants.

Break Your Shell: The Benefits of Volunteering and Leadership in NCURA
Presenters: Martin Williams, Director, Office of Sponsored Programs, William Paterson University and Past Chair, Region II; Dan Nordquist, Director, Office of Grant and Research Development, Washington State University and President, NCURA; and Kathleen Larmett, Executive Director, NCURA.
Program Track: General
Program Level: Beginner
Description: This discussion group will help participants to consider the value of service to NCURA as a regional or national volunteer or officer to both their personal and professional lives. Join NCURA’s current President, Region II’s Immediate Past Chair, and NCURA’s Executive Director to learn how professional associations like NCURA can provide opportunities to push personal boundaries, to try and learn and test ways of interacting with peers and committees so that you are more ready to do it “at home,” and to gauge and test your knowledge and skills in a supportive and responsive environment. Involvement can also help those of us who tend to be shy and quiet explore alternatives and build confidence.

COGR Update
Presenter: Alexandra McKeown, Associate Dean for Research Administration, Johns Hopkins Bloomberg School of Public Health
Program Track: Federal
Program Level: Intermediate
Description: The Council on Governmental Relations (COGR) is an association of more than 170 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. A COGR Board member will present a Washington update, discussing the significant research policy and regulatory issues currently facing the research community.

6:00 p.m. – 10:00 p.m.  Tuesday Night Event

Join us at the Allstar Events Complex (conveniently located right next to the Eisenhower) and unleash your inner-kid at a fun-filled cook-out and three hours of unlimited fun! Events include: Go-Kart Tracks, Miniature Golf, Horseshoe Pits, Arcade Games, Billiards, Indoor Soccer, Indoor Volleyball, Basketball, and a Space Capsule Thrill Ride!
9:00 p.m. – 12:00 midnight **Hospitality Suite open**

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**Wednesday, April 25**

7:30 a.m. – 10:00 a.m.  **Registration**

7:30 a.m. – 8:40 a.m.  **Breakfast and Breakfast Discussion Groups**

**Table 1: Ask a Departmental Administrator**
Facilitator: Tammie Martin, Research Administrator, Office of Research and Project Administration, University of Rochester

**Table 2: Ask a Pre-Award Administrator**
Facilitator: Cheryl K. Williams, Assistant Director, Office of Research and Project Administration, University of Rochester

**Table 3: Ask a Post-Award Administrator**
Facilitator: Janice Oakley, Manager, Contract & Grant Accounting, University of Maryland College Park

**Table 4: Ask a PUI Administrator**
Facilitator: Angela Sgroi, Director of Grant Operations, The College of New Jersey

**Table 5: Ask a Senior Level Administrator**
Facilitator: Holly Benze, Director, Johns Hopkins University

**Table 6: Ask a Medical/Clinical Administrator**
Facilitator: Tolise Miles, Senior Administrator, Biomedical Graduate Program Organization, Georgetown University

**Table 7: New Member Table**
Facilitator: Anne Albinak, Senior Analyst, Finance and Sponsored Projects, Whiting School of Engineering Business Office, Johns Hopkins University

**Table 8: Mentor/Mentee Table**
Facilitators: Leerin Shields, Manager, Contracts and Grants, University of Maryland, Baltimore; Brian Squilla, Chief of Staff, Office of the Dean, Jefferson Medical College, Thomas Jefferson University

8:45 a.m. – 9:45 am  **Concurrent Sessions and Discussion Groups**

**Research Administration Training Program: How to Develop and Sustain a Program for Finding the Next Generation of Research Administrators**
**Presenter:** James Aumiller, Senior Associate Dean, Finance and Administration, JHU School of Engineering
**Program Track:** Senior
**Program Level:** Intermediate
**Description:** About three years ago, Johns Hopkins University started a Research Administration Training Program for developing potential research
administrators. This program rotates cohorts of trainees through different R/A-related departments so the trainees get a well-rounded view of what research administration is and what types of jobs are possible. To this date, there have been three cohorts, the first of which graduated and almost all of the graduates are now employed full-time at JHU in departmental/central research administration-type jobs. How the program was crafted, implemented and carried through would be the presentation.

**Learning Objectives:**
- Learn how a new program was developed.
- Learn what is taught.
- Learn how your institution might develop their own program

**Enhancing PUI Grant Proposal Competitiveness by Developing, Implementing and Sustaining Strategic Collaborations**

**Presenters:** Martin Williams, Director, Office of Sponsored Programs, William Paterson University; Nina A. Leonhardt, Associate Dean for Continuing Education, Suffolk County Community College; Candice J. Foley, Suffolk County Community College NSF S-STEM I & II PI/Chair, Professor of Chemistry

**Program Track:** PUI

**Program Level:** Intermediate

**Description:** A panel of PUI research administrators will share their experiences in developing collaborations to create competitive, successful grant programs. They will talk about the challenges they faced, the successes they enjoyed, the unexpected highs and lows, the role of serendipity, and the lessons learned.

**Learning Objectives:**
- To identify the key role strategic collaborations can play in developing successful proposals for certain types of programs.
- To understand how collaborations are best formed.
- To learn key features in sustaining a successful collaboration.
- To consider innovative program components for multidisciplinary S-STEM programs.

**Managing and Meeting Deadlines**

**Presenters:** Angela Sgroi, Director of Grant Operations, The College of New Jersey; Cheryl K. Williams, Assistant Director, Office of Research and Project Administration, University of Rochester

**Program Track:** Pre-Award

**Program Level:** Beginner and Intermediate

**Description:** Deadlines – they are constant, never-ending facts of life in sponsored program and how you manage them will dictate your success and happiness in your position. In this session we will talk about various ways to manage the deadlines such as:
- Recognizing that there is no off season for grant submissions in research administration.
- Restructuring how you do business in your own office.
- Offering continuous training programs to make your institution’s community aware of upcoming grant deadlines and processes.
- Making sure faculty are aware of reasons for internal deadlines.
- Facilitating institutional proposal development.
- Structuring a quick and easy review and approval process.
- Establishing reasonable, firm internal deadlines.
- Getting upper management buy-in and support for internal deadlines.

Sounds easy, doesn’t it? Well, we all know it’s a process. Join us in this interactive session and bring your deadline face.

**Learning Objectives:**
• To identify the most common blocks to meeting deadlines calmly.
• To understand the institutional interconnectedness that can hinder and enhance a grants office’s success in managing proposals in a thoughtful, timely manner.
• To gain useful ideas for improving one’s own grants procedures for managing deadlines.

A-133, OIG Audits, Site Visits
Presenters: Debra Murray, Assistant Director, Sponsored Projects Compliance, Georgetown University; Janice Oakley, Manager, Contract & Grant Accounting, University of Maryland College Park
Program Track: Post-Award
Program Level: Intermediate
Description: Audits and Site Visits are inevitable and preparing for them starts when the proposal is drafted. Is your institution ready? Not just the pre- and post-Award office, but the departmental research administrators and principal investigator. This session will for focus on preparing and surviving an external audit and site visit from multiple perspectives: the campus central offices, sponsored programs, the departments.
Learning Objectives:
• Participants will have an increased awareness of the different perspectives of the auditor, sponsored program office, Principle Investigator and department administration.
• Participants acquire information for a successful audit and site visit preparation.
• How to use the audit as a way to improve compliance.

Understanding Department of Education
Presenter: Marjorie Piechowski, Director of Research Support, University of Wisconsin-Milwaukee
Program Track: Federal
Program Level: Basic
Description: This session will present information on the purpose of the U.S. Department of Education (ED) and its many diversified programs, such as FIPSE, GAANN, Title III, Title IV-TRIO, Title V (Hispanic-serving Institutions), international education and foreign language programs, including travel opportunities, and special education and rehabilitation programs. Especially for new applicants or those who are familiar with NSF and NIH grants, it is also important to understand the ED review process and the ED electronic grant application portal, different from grants.gov and Fastlane. Information on these processes will be included in the session, along with examples of proposal formats and abstracts. The presenter, Dr. Marjorie Piechowski, has written over twelve million dollars of successful grant applications to ED for multiple institutions of higher education and has served as an ED reviewer for over 15 years.
Learning Objectives:
• Understand the purpose and structure of the U.S. Department of Education (ED).
• Learn about the many programs available to higher education.
• Become familiar with the ED review process and scoring system.
• Understand the ED electronic application process
Concurrent Sessions and Discussion Groups

Clinical Trials Financial Management – Pre- and Post-Award

Presenters: Tony Hursey, Director of Regulatory Affairs, Georgetown University Medical Center; Karen Roz, Associate Director, Clinical Research Support Services, Johns Hopkins University
Program Track: Medical/Clinical
Program Level: All
Description: This presentation will cover key rules, analyses, and processes required for sound financial management of clinical trials. Typical difficulties in carrying out financial management processes will be discussed in depth. Practical tools for critical pre and post award financial management processes will be demonstrated and discussed.

Learning Objectives:
- Review Medicare Clinical Trial Billing Rules.
- Learn how to determine standard of care vs. research and how to use these determinations in the budgeting process.
- Learn how to analyze Clinical Trial Contracts language to ensure proper sponsor invoicing and gain a clear understanding of the information you need to ensure proper sponsor invoicing.
- Discuss common problems with tracking sponsor payments and with internal funds flow process at within the study site.

I Signed What? What Does a Signature Mean and Why Is it Necessary?

Presenter: Angela Sgroi, Director of Grant Operations, The College of New Jersey; Mary Louise Healy, Associate Director of Research Administration, Krieger School of Arts and Sciences, Johns Hopkins University
Program Track: PUI
Program Level: Basic
Description: All institutions require internal approvals, certified by some sort of "signature," prior to proposal submission, and contractual documents require signature to indicate agreement with terms. Each institution will have its own hierarchy for approvals and signature authority delegation. At a predominantly undergraduate institution, it’s especially important for not only research administrators, but also administrators within departments and colleges, and faculty, to understand what a signature means and why it is so important. This interactive session will use a case study to focus the questions faced by most predominantly undergraduate institutions in determining and implementing their signing policies.
Learning Objectives:
- Describe the importance of signatures on proposals and awards.
- Differentiate between programmatic and administrative approvals.
- Avoid pitfalls associated with ambiguity or lack of understanding.
- Develop an effective and efficient hierarchy for signatures or streamline current practices.

Circular Reference - OMB A-21, A-110, A-133 ©

Presenters: Rhonda Kloss, Director of Sponsored Projects Accounting, Carnegie Mellon University; Leslie Levine, Director, Research Office, The Marianna Brown Dietrich College of Humanities and Social Sciences, Carnegie Mellon University
Program Track: Departmental
Program Level: Beginner
Description: This session will provide participants with information about the OMB circulars applicable to higher educational institutions. These federal circulars anchor policy and practice with regard to administering sponsored funds in an institution of higher education. The session will provide a general overview as well as highlights from the circulars and real life examples.
Learning Objectives:
- Understand the scope and purpose of the Office of Management and Budget circulars A-21, A-110, and A-133.

Navigating Your First Two-Five Years in Research Administration
Presenters: Jennifer Hopkins, Grants Associate, Johns Hopkins Bloomberg School of Public Health; Jasmine Monte, Subaward Specialist, Johns Hopkins Bloomberg School of Public Health
Program Track: Pre-Award
Program Level: Basic
Description: This discussion group is directed toward research administrators who are 2-5 years into their careers. We will focus on ways to establish or discover a career path in Research Administration. Topics will include identifying mentors, training opportunities, and networking with other research administrators. This session is a great opportunity to network!
Learning Objectives:
- Designating a career path.
- Identifying mentors and training opportunities.
- Networking and "comparing notes" with other research administrators with 2-5 years experience that have similar career goals.

Marcellus Shale: Its Impact on University Research Across Region II
Moderator: Pamela Wheat, Senior Research Program Development Officer, Lehigh University
Presenter: Michael A. Arthur, Professor of Geosciences and Co-Director, Marcellus Center for Outreach and Research, Penn State University
Program Track: General
Program Level: All
Description: The Marcellus Shale deposit spans a distance of approximately 600 miles, running from the southern tier of New York, through the western portion of Pennsylvania into the eastern half of Ohio and through West Virginia. The areal extent of the Marcellus Shale is about 54,000 square miles, which is slightly larger than Florida. Research universities across Region II are currently examining research strengths and establishing research centers and institutes focusing on the environmental, societal and economic impact Marcellus Shale will have on this region. Find out more about how universities are ramping up and forging new research collaborations with other universities, NETL, and industry partners -- proactively positioning for much anticipated state and federal research funding.
Learning Objectives:
- To provide an overview of the Marcellus and Utica shale phenomenon across Region II.
- To introduce the scientific and technical issues involved with fracking and distribution of shale gas.
- To briefly outline some of the key economic, social, and environmental issues involved with Marcellus development.
- To discuss the impact of shale gas development on university research especially new areas of research, regional collaboration and potential funding.
• Learn about National Energy Technology Laboratory – Research University Alliance (NETL-RUA) in western Pennsylvania.
• One university response – The Marcellus Center for Outreach and Research (MCOR) Penn State’s education and research initiative on unconventional gas plays.

11:15 a.m. – 11:30 a.m.  Break

11:30 a.m. – 12:30 p.m.  Concurrent Sessions and Discussion Groups

Surviving Pre-Award Disasters
Presenters: Ted Fehskens, Sponsored Projects Officer, Krieger School of Arts and Sciences, Johns Hopkins University; Mary Louise Healy, Associate Director of Research Administration, Krieger School of Arts and Sciences, Johns Hopkins University
Program Track: Pre-Award
Program Level: All Levels
Description: The PI changed the budget at the last minute; it now includes a subaward and there is no proposal documentation from the subawardee. A PI has just told you about a proposal deadline – tomorrow – and you have six other proposals that need to be submitted by then, none of which is in great shape. A corporate collaborator is reluctant to give you salary and other pricing information, and the agency format to which you must adhere requires these details. These and other pre-award disasters seem to befall us daily. In this session, we will discuss pre-award “glitches,” how to anticipate them, and how to prevent them from becoming full-blown disasters. Some of the topics that may be discussed are multiple competing deadlines, “done deals” that really are all but, limited submission programs, eligibility questions, submission systems that don’t require institutional approval, and dealing with PIs and administrators in extremely stressful situations.
Learning Objectives:
Participants will have the opportunity to:
• Share creative solutions to the many problems that arise at the pre-award stage.
• Learn about common problems and share ways of anticipating them so as to avoid them to the extent possible.
• Discuss ways to prevent problems from becoming disasters.

Research Administration at the Smallest of PUIs
Presenter: Robin Dewey, Director of Academic and Government Grants, McDaniel College
Program Track: PUI
Program Level: Intermediate
Description: Everyone knows there is a difference between a research-intensive university and a PUI. What some don’t realize, however, is the amount of diversity that exists among the PUIs themselves. There is a huge difference between a PUI that has a sponsored programs office of 12, and a PUI that has a sponsored programs office of 1. This discussion group would give a chance for those at the smallest of institutions to gather and talk about issues of the day, since we often don’t have a listening ear available on our own campuses.

Invoicing Terms and Conditions
Presenter: Tammie Martin, Research Administrator, Office of Research and Project Administration, University of Rochester
Program Track: Post-Award  
Program Level: All Levels  
Description: Details coming soon  
Learning Objectives:

Current Issues in Managing Research Administration: Best Practices for Department Administrators  
**Presenters:** Anne Albinak, Senior Analyst, Finance and Sponsored Projects, Whiting School of Engineering Business Office, Johns Hopkins University; Jennifer Foley, Assistant Clinical Director, Financial & Administration, Biomedical Graduate Organization, Georgetown University; Donna Jean Garrett, Assistant Director, Finance and Administration, Biomedical Graduate Research Organization, Georgetown University  
Program Track: Departmental  
Program Level: All Levels  
Description: This discussion session will focus on crucial issues associated with managing research administration at the departmental level. The panel will discuss successful policies and procedures that have been developed in their departments. Please join our open forum discussion as we review key research issues that are affecting departmental administrators.  
Learning Objectives:
- Identify the current important matters in managing research administration at the department level.
- Learn how the panel has addressed these concerns.
- Discuss how your department is managing these issues.
- Become knowledgeable about variety of approaches to deal with complex situations.

National Science Foundation Update  
**Presenter:** Anne Doyle, Senior Policy Analyst, Policy Office, Division of Institution and Award Support, National Science Foundation  
Program Track: Federal  
Program Level: All levels  
Description: This session will cover new developments at NSF - programs, policies, people and budgets. Senior NSF staff will provide a comprehensive review of what is new and developing at the National Science Foundation. Key administration initiatives and important recent and upcoming policy changes will be discussed. Topics will include acceleration of American Recovery and Reinvestment Act (ARRA) awards, revision of the NSF merit review criteria recommended by the National Science Board (NSB), changes to NSF’s terms and conditions and an update on the Research Performance Progress Report (RPPR). Information on the progress of NSFs modernization of FastLane with Research.gov also will be provided.  
Learning Objectives:
- Learn about the NSF FY 2012 and 2013 budgets and administration priorities for NSF programs.
- Understand how NSF has implemented recent changes to proposal and award policies and procedures.
- Learn about the progress of FastLane’s modernization with Research.gov.

12:30 p.m. Adjourn

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<th>Topic</th>
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