



**Saturday CRA Review Session (Saturday, October 6th)**

Review Session for Certified Research Administrator (CRA) Exam

See Research Administration Certification Council (RACC) website for details and for registration & payment

<http://www.racc-cert.org/exam-review-sessions/>

**Sunday Pre-Conference Workshops (half-day sessions on Sunday, October 7th)**

**Track Leaders: Michiko Taniguchi Pane (Stanford University), Vicki Krell (Arizona State University)**

**Morning Workshops (8:30am - 12:00pm)**

**Lifecycle of an Award, Part 1 - It's Time to Submit a Proposal. Let's Do This!**

The process of submitting a proposal is challenging due to the amount of information that has to be gathered and reviewed before the submission can occur. Understanding the sponsor's requirements, adhering to sponsor and institutional guidelines while keeping the principal investigator on track to meet the sponsor's due date can be like a circus act.

This workshop will help you get through common and not-so-common proposal development obstacles and develop skills so you can expertly guide the process. We will cover proposal submission from beginning to end, including the proposal solicitation, regulatory requirements, budget development, justification for funding, scope of work, working with PIs and everything else you need to get the proposal out the door.

Alexa Van Dalsem, Senior Manager, Proposal Development, University of Colorado Boulder

Carly Cummings, Director, Research and Faculty Development, University of Idaho

**Working with Industry: Negotiating Agreements and Other Nuances**

Negotiating with industry sponsors can feel like trying to communicate using languages from different planets. Come learn how to bridge that gap and form effective partnerships with industry sponsors while still protecting your institution.

Learning Objectives:

1. Participants will learn basic negotiating techniques and the theories behind them.
2. Participants will review and discuss common troublesome terms in university negotiation.

Beth Kingsley, Senior Grant Analyst, Denver Health and Hospital Authority

Sarah Payne, Attorney, Contracts Group, SRI International

<p>3. Participants will explore and develop their own approaches to negotiating with industry sponsors.</p>	
<p><b>Morning Workshops (8:30am - 12:00pm) (continued)</b></p>	
<p><b>Agreements: The Good, the Bad and the Downright Painful</b></p>	
<p>Do you freeze whenever you hear the word RFP or receive a contract to negotiate and review? In this workshop, you will learn common clauses that slow down contract negotiation and their relevance to your pending contract. Additionally, you will learn tools to help you during all stages of contracting: proposal submission (including exception letters), contract negotiation, and award management for all sponsor types including flow-through contracts. Attendees will participate in case studies to apply the concepts discussed in the workshop.</p> <p>Learning Objectives:</p> <ol style="list-style-type: none"> <li>1. Participants will learn the basic parts of an RFP and how to address possible contract issues at proposal stage.</li> <li>2. Participants will gain tools to negotiate federal, federal flow-through, and other types of contracts.</li> <li>3. Participants will learn the importance of, and best practices to address, the most problematic clauses in contracts.</li> <li>4. Participants will gain Post Award Management tips and tools.</li> </ol> <p>Prerequisites: Basic understanding of the management of sponsored projects.</p>	<p>Dennis Paffrath, Assistant Vice President, Sponsored Programs University of Maryland, Baltimore</p> <p>Denise Clark, Associate Vice President for Administration, University of Maryland, College Park</p>
<p><b>Departmental Research Administrator BOOTCAMP</b></p>	
<p>This workshop will provide an overview of the subject matter which departmental research administrators (DRAs) need to know in order to effectively manage research. We will cover the role of a DRA, sponsored vs non-sponsored support for researchers, compliance issues, space and facilities, on-boarding, and more. We will explain how to review research portfolios in terms of sustainability, recognizing financial cliffs, planning for expansion of labs, how to supplement traditional methods of financial support. We will also discuss the fundamentals of working with faculty: helping them develop proposal plans, familiarizing them with the local and global research environments, and helping them navigate the multitude of compliance regulations associated with research. We will also have a scenario-based discussion for application of common themes for the DRA.</p>	<p>Derick F. Jones, Program Manager, Los Angeles Biomedical Research Institute</p> <p>Rashonda Harris, Associate Director, Emory University</p>

**Morning Workshops (8:30am - 12:00pm) (continued)**

**Project Management for Research Administrators - Mastering Air Traffic Control**

It's time for your office to head an important new initiative on campus. Now what? You're a research administrator, not a project manager...right? Some project management requirements can seem pretty daunting.

Being able to translate and master air traffic control skills you have honed as a research administrator comes in handy when you dive into managing a project.

In this workshop we explore some project management approaches, resources, and tools that can enhance your project management skills, whether for a small, informal project or for something more complex in size and scope.

We will test some of these resources using realistic research administration scenarios that may come up.

Learning Objectives:

1. Participants will learn how project management approaches can be helpful for research administrators.
2. Participants will develop a greater understanding of project management skills/requirements, including:
  - Keeping track of information from a variety of sources
  - Making sure milestones are met
  - Managing groups of people who do not report to you (and who have a lot of other priorities)
  - Soliciting feedback
  - Communicating with stakeholders
  - Ensuring successful roll out of the end product.
3. Participants will be able to apply common project management tools and resources to typical research administration projects

Prerequisites: Prior involvement in activities such as policy development, business process development and implementation, system implementations or changes, or training program development will be helpful.

Amanda Snyder, Associate Director, University of Washington

Mara Rivet, Communications Specialist, University of Washington

**Afternoon Workshops (1:30pm - 5:00pm)**

**Lifecycle of an Award, Part 2 - So You've Received Your Award. Now What?**

The key to setting up an award is knowing the four components (order of precedence, governance of direct costs, financial management and internal controls) of post-award administration and understanding how important they are to the award setup process.

This workshop will walk through the four components and its relationship to cost share, administrative requests, effort reporting, cost transfers, procurement and the closeout of a sponsored project.

**Learning Objectives:**

1. Describe the order of precedence and the governance of direct costs
2. Provide an overview of the financial management process and how it defines the organization's internal control policies and procedures.

Tolise Dailey, Training Specialist,  
University of Colorado at Boulder

Sarah Martonick  
Post-Award Manager  
University of Idaho

**Slicing and Dicing and Getting to Know DoD/DoE: Best Practices to Navigate a Lifecycle under these Challenging Sponsors**

This session will focus on unique challenges in working with the Department of Energy (DOE) and Department of Defense (DoD). Participants will learn best practices for proposal development and post-award management. Special attention will be paid to budget development, cost share, and invoicing. Participants will learn how to navigate these sponsors by gaining an understanding of issues and past shared learning experiences that come with these sponsors. This will be an interactive session aimed at answering questions and sharing information.

Lisa Anaya Esquibel, Senior  
Research Administrator, Colorado  
State University

Joelina Peck, Assistant Director of  
Research Advancement, School of  
Electrical, Computer and Energy  
Engineering

**Being Persuasive: Effectively Communicating Your Message to Positively Influence Outcomes**

How clearly and effectively a message is delivered can be the difference between success and failure. Or maybe more importantly, for those already stretched for time, it can be the difference between nipping a difficult situation in the bud or many more hours working to resolve an issue. This workshop will explore the strengths and limitations of various methods of communication, reincorporating a personal touch in an electronic age, and strategies for preparing and navigating challenging conversations, including those involving faculty. Through interactive case studies and exercises, participants will learn to apply various persuasive approaches for those situations when you really need to get your message across.

Michiko Taniguchi Pane, Director,  
Pre-award Operations, Client  
Advocacy and Electronic Research  
Administration, Stanford  
University

Vicki Krell, Assistant Director of  
Research Advancement, College  
of Liberal Arts and Sciences,  
Arizona State University

**Afternoon Workshops (1:30pm - 5:00pm) (continued)**

**Intellectual Property Lifecycle: Innovation Lifecycle from Research Proposal to Patented Product**

By creating intellectual property, university researchers create economic engines that can drive the global economies of tomorrow. To capitalize on strong intellectual property, your institution must support faculty inventors throughout the research continuum, with background IP searches, compliance consulting, contract drafting and negotiation, and the professionals required to draft a patent application. Managing the documentation necessary to capitalize on intellectual property takes planning, and IP licensing can be complicated and time-consuming.

To successfully address these issues and more, this workshop will:

- (1) provide an overview of the intellectual property services research institutions can provide throughout the continuum of research activities;
- (2) prepare participants to identify key issues raised by intellectual property terms in requests for proposals, award letters, terms and conditions, and contracts related to university work;
- (3) arm participants with vocabulary and knowledge to more effectively communicate about intellectual property development at their institution;
- (4) engage participants in interactive discussions related to best practices around developing and managing intellectual property.

Jeremy Tamsen, JD, Director,  
Office of Technology Transfer  
University of Idaho

Casey Inge, JD, PhD  
Sr. Associate General Counsel  
University of Idaho

**Subaward Risk Assessment - Thinking Big!**

The subaward risk assessment may be a federal requirement, but if you're going to do it, why not use it? This workshop will focus on what risk factors you can identify in everything from Single Audits, to annual reports, and even unaudited financial statements. You will learn how to identify potential risk factors, what they can indicate, approaches for different types of subrecipients, as well as how you can use the elements you collect to shape your contracting, oversight, and monitoring.

Laura Register, Assistant Director,  
Subaward Oversight & Compliance,  
Stanford University

Jason Oliver, JD, Assistant Contract  
Review Officer, University of Idaho