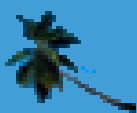


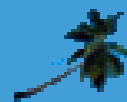
# NATIONAL COUNCIL OF UNIVERSITY RESEARCH ADMINISTRATORS

## REGION III SPRING MEETING

*Innovative Strategies,  
The Necessary Tools  
To Win The Battle*



May 3-6, 2009



Panama City, Florida



# Thank you!

NCURA Region III wishes to thank our sponsors for their support!

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## Institutional



# Program Committee

## *Chair*

*Jill Frazier Tincher, University of Miami*

- ★ *Cynthia Hope, The University of Alabama*
- ★ *Danielle McElwain, University of South Carolina*
- ★ *Robyn Remotigue, Mississippi State University*
- ★ *Riddick Smiley, East Carolina University*
- ★ *Greg Thompson, Florida State University*
- ★ *Mo Valentine, University of Arkansas for Medical Sciences*
- ★ *María Valero-Martínez, University of Miami*
- ★ *Michelle Vazin, Vanderbilt University*
- ★ *Jeanne Ware, New College of Florida*





# *Welcome to NCURA Region III's 2009 Meeting*

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# Agenda

## *Sunday, May 3, 2009*

**Registration** 7:00am - 5:30pm

**Continental Breakfast** 7:00am - 8:30am

### **Full-day Workshops**

8:30am - 5:00pm

### **Morning Workshops**

8:30am - 12:00pm

**Morning Break** 10:00am - 10:15am

**Lunch** 12:00pm - 1:00pm

(Workshop participants only)

### **Afternoon Workshops**

1:30pm - 5:00pm

**Afternoon Break** 3:00pm - 3:15pm

### **Orientation For Newcomers**

5:15pm - 6:00pm

### **Welcome Reception**

6:00pm - 7:00pm

### **Hospitality Suite Open**

8:00pm - 12:00am

## *Monday, May 4, 2009*

**Continental Breakfast** 7:30am - 9:00am

### **Welcome and Keynote Address**

9:00am - 10:30am

**Morning Break** 10:30am - 10:45am

### **Morning Concurrent Sessions**

10:45am - 12:00pm

**Lunch** 12:00pm - 1:00pm

### **Afternoon Concurrent Sessions & Discussion Groups**

1:30pm - 2:45pm

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

### **Late Afternoon Concurrent Sessions**

3:15pm - 4:30pm

### **Hospitality Suite Open**

8:00pm - 12:00am

## *Tuesday, May 5, 2009*

**Continental Breakfast** 7:30am - 9:00am

### **Morning Concurrent Sessions & Discussion Groups**

9:00am - 10:15am

**Morning Break** 10:15am - 10:30am

### **Late Morning Concurrent Sessions & Discussion Groups**

10:30am - 11:45am

**Lunch** 12:00pm - 1:00pm

### **Afternoon Concurrent Sessions**

1:30pm - 2:45pm

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

### **Late Afternoon Concurrent Sessions & Discussion Groups**

3:15pm - 4:30pm

### **Dinner/Party**

6:00pm - 10:00pm

### **Poker Run for Fun**

6:00pm - 10:00pm

### **Hospitality Suite Open**

8:00pm - 12:00am

## *Wednesday, May 6, 2009*

### **Breakfast & Regional Business Meeting**

8:30am - 10:00am

### **Panel Discussion**

10:15am - 11:30am

**Adjourn** 11:45am



# Agenda

## Hospitality Suite Activities

**Meet new and existing colleagues and have some fun!**

The suite will be open Sunday through Tuesday,  
8:00 p.m. – 12:00 a.m.  
Ambassador Suite, 6<sup>th</sup> Floor Main Building



### School Spirit!

Sunday, May 3, 2009  
Caps, t-shirts, sweats, etc....  
Represent your school



### Wanna Play?

Monday, May 4, 2009  
Board games & card games



### Cinco de Mayo!

Tuesday, May 5, 2009  
How low can you go?

*Special thanks and appreciation to our  
Hospitality Suite Sponsor, American Appraisal*



# *Thank you Volunteers!*

*The 2009 Region III Meeting could not have occurred without the 2009 Program Committee, the Regional Officers, Regional Committees, the workshop faculty, concurrent session speakers, discussion group leaders, moderators and the countless volunteers who have assisted with registration desk, audio visual assistance, hospitality suite, fundraising, dinner groups, etc. A special thank you to all of you for your contributions!!*



*Sunday, May 3, 2009*



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

Registration Desk



**Continental Breakfast 7:00 a.m. - 8:30 a.m.**

St. Andrews Ballroom



**Full-day Workshops 8:30 a.m. - 5:00 p.m.**



**Morning Workshops 8:30 a.m. - 12:00 p.m.**



**Morning Break 10:00 a.m. - 10:15 a.m.**

St. Andrews Ballroom Foyer



**Lunch 12:00 p.m. - 1:00 p.m.**

St. Andrews Ballroom



**Afternoon Workshops 1:30 p.m. - 5:00 p.m.**



**Afternoon Break 3:00 p.m. - 3:15 p.m.**

St. Andrews Ballroom Foyer



# Workshops

Sunday, May 3, 2009

## 8:30 a.m. – 5:00 p.m. Full-Day Workshops

### W1

#### *“Increasing Transfer in Training: Successful Approaches to Training for Research Administrators”*

**Location:** St. Andrews Ballroom I

**Presenters:** Sam Gannon, Manager, Education & Training, Vanderbilt University Medical Center

In this full day train the trainer workshop participants will become knowledgeable about adult learning styles and discuss the barriers to transfer in research administrator education and training programs and how to overcome them. The workshop will introduce and demonstrate strategies to engage faculty, students and staff members in training and how to measure effectiveness. Participants will learn to use the Understanding by Design methodology in approaching their training classes and will be given some general design guidelines for PowerPoint and materials/handouts. Bring materials from a current class or one you're planning so that we may workshop it in the afternoon and you can return to work with a new class that's ready for success.

### W2

#### *“Introduction to Pre-Award”*

**Location:** St. Andrews Ballroom II

**Presenters:** Robyn Remotigue, Assistant Director, Mississippi State University, Charles Patterson, Associate Vice President for Research, Georgia Southern University and Kacey Strickland, Director, Office of Regulatory Compliance of Mississippi State University

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 and compliance; electronic research administration; office models and organization; proposal development, review and submission; monitoring and compliance for research subjects; hot topics in research administration and more. Come prepared to interact, learn and share your experiences in an enjoyable setting!



# Workshops

Sunday, May 3, 2009

8:30 a.m. – 12:00 p.m. Morning Workshops

W<sub>3</sub>

*“The Complete Award Administrator: A-21, A-110, A-133 and Good Coffee”*

**Location:** St. Andrews Ballroom V

**Presenters:** Cynthia White, Director, Office of Sponsored Programs, Belmont University

Why do some proposals specialist and department administrators seem to make fewer errors and prevent more problems than their colleagues? Despite tea drinkers and other outliers, research indicates that high quality coffee is a significant factor. However, there is also strong evidence suggesting that a mastery of applicable OMB Circulars gives a research administration professional a grasp of the big picture, e.g., the regulatory framework undergirding the entire grant lifecycle. Understanding how each phase of the grant cycle relates to the next empowers award administrators to foresee and prevent future problems for themselves, PIs and their administrative colleagues. This session will review the parts of the circulars which are particularly helpful to pre-award and departmental staff with the goal of decreasing unreported program income, unidentified cost sharing, disguised vendor contracts and stuffed crust pizza in proposal budgets. This information is also useful to the post award administrator with no clue what those non-financial folks are drinking that would keep them from identifying such glaring potential problems. With fewer problems to untangle, fewer disgruntled guests will drink your expensive coffee. In this budget environment that's a great learning outcome.

W<sub>4</sub>

*“Negotiating for Mutual Satisfaction”*

**Location:** St. Andrews Ballroom VI

**Presenters:** Barbara Gray, Director, Grants and Contracts, Valdosta State University

Old style, hard tactic techniques used to negotiate commodity prices, and even the newer "win-win" strategies in which both sides come away from the table with something they can live with, are not the most appropriate approaches to negotiating, whether the negotiation is related to a sponsored project agreement, an issue with a faculty member, a problem in the sponsored programs office, or a conflict with another university office. Principled negotiation can help you establish and manage positive relationships with others. More importantly, negotiating for mutual satisfaction, in which both parties derive greater benefit than either initially thought possible, can help you sustain long-term partnerships that can be applied widely in negotiating for mutual satisfaction, including establishing a professional tone and approach, preparing for and managing the negotiation, and building a bigger "pie" for the parties. Participants will complete several exercises, including a role play negotiation when a university project funded by start-up company goes away.

# Workshops

Sunday, May 3, 2009

## 1:30 p.m. – 5:00 p.m. Afternoon Workshops

### W5

#### *“Sub-awards and Monitoring From Writing the Proposals to Project Closeout- How to Manage Risk”*

**Location:** St. Andrews Ballroom V

**Presenters:** Rob Roy, Director of Business Operations, Georgia Institute of Technology and Anita McKinney, Contracting Officer, Georgia Institute of Technology

One of the fastest growing areas in research administration is inter-institutional collaborations. This workshop will be a guided discussion with participants about sub-awards starting with a look at the National Sub-award Model Agreement Form, progressing through roles and responsibilities, things to keep in mind when writing a proposal, to effective monitoring procedures, and closeouts. The workshop will look at sub-awards and sub-recipient monitoring from a departmental perspective identifying areas of potential risk as well as auditing guidance from various sources including recent audit findings.

### W6

#### *“Beyond the Fundamentals of Post Award Issues”*

**Location:** St. Andrews Ballroom VI

**Presenters:** Cynthia Hope, Director, Office for Sponsored Programs, The University of Alabama and Brian Squilla, Administrative and Financial Officer, University of Pennsylvania

It's easy to identify the issue once the award is received and the work is underway. But, until it becomes a problem, how can anyone know what the potential issue is and why would anyone suspect it could create problems and who should have identified the issue in the first place? We will be providing tools and cases to lead an in-depth discussion of variety of issues that typically rear their ugly heads during post award, but are more effective communication between central pre and post award personnel, departmental administrators and principle investigators.



*Sunday, May 3, 2009*



### **Orientation For Newcomers**

**5:15 p.m. - 6:00 p.m.**

St. Andrews Ballroom VI

This is a fast paced session on the ins and outs of NCURA Region III, and detailed information on how to get involved. Use this time to greet other newcomers, begin developing your own NCURA network, and learn how to maximize your NCURA experience.



### **Welcome Reception**

**6:00 p.m. - 7:00 p.m.**

Grand Lagoon Deck

It's time to mingle with new members, as well as get caught up with old friends. Cocktails and appetizers will be served.



### **Hospitality Suite Open**

**8:00 p.m. - 12:00 a.m.**

Ambassador Suite, 6th Floor Main Building

The hospitality suite is a convenient location to meet up with colleagues and relax at the end of the day. So, when you head back from dinner, please be sure to stop by the suite and have some fun.

*Region III Hospitality Suite is sponsored by  
our Gold Level Sponsor, American Appraisal.*



# Region III Fundraising State Cup

*In 2008, the NCURA National Office encouraged all Regions to conduct fundraisers and give back to our community. Each Region was given the ability to select the organization which would benefit by this fundraising. Region III chose to support ShelterBox, an organization that provides humanitarian aide to people displaced by disasters. During our regional meeting, please support Shelterbox. Learn more about this organization during Monday's lunch. In addition, please stop by the Shelterbox table in the Exhibitors area.*

## REGION III FUNDRAISING ACTIVITIES

*What's better than raising funds for a worthy cause? A little competition, of course! Starting this year, Region III will begin the "tradition" of State Fundraising Champion.*

*Come by the Registration Desk starting Sunday to give your pocket change for a worthy cause and help your home state to win. State jars will be counted on Tuesday and winners will be announced at Wednesday's Business Meeting.*

*The state that wins will have all those from the state gather together for a "team" picture (to be put on the Region III website) and engraved on the soon-to-be unveiled State Cup!*

The logo for ShelterBox, featuring the word "shelter" in a white, lowercase, sans-serif font above the word "BOX" in a larger, white, uppercase, sans-serif font. The letter "O" in "BOX" is replaced by a small, stylized globe of the Earth. The entire logo is set against a solid green rectangular background.

### **The ShelterBox Mission**

*"To provide humanitarian aid worldwide in the form of shelter, warmth and comfort to people displaced by natural and other disasters."*

# Monday, May 4, 2009



## Continental Breakfast

7:30 a.m. - 9:00 a.m.

St. Andrews Ballroom Foyer  
Seating available in Spanish Moss



## Welcome and Keynote Address

9:00 a.m. - 10:30 a.m.

St. Andrews Ballroom III and IV



## Morning Break

10:30 a.m. - 10:45 a.m.

St. Andrews Ballroom Foyer



## Morning Concurrent Sessions

10:45 a.m. - 12:00 p.m.



## Lunch

12:00 p.m. - 1:00 p.m.

Grand Lagoon Ballroom



## Afternoon Concurrent Sessions & Discussion Groups

1:30 p.m. - 2:45 p.m.



## Afternoon Break

2:45 p.m. - 3:00 p.m.

St. Andrews Ballroom Foyer



## Late Afternoon Concurrent Sessions

3:15 p.m. - 4:30 p.m.

Keynote



**Dr. Felicia  
Chisolm  
Coleman**  
Coastal and  
Marine  
Laboratory,  
Florida State  
University

Speaker

Dr. Coleman is the Director of the Florida State University Coastal and Marine Laboratory and Director of the undergraduate academic Certificate Program in Marine Biology. Her research experience is in the area of marine ecology, particularly as it relates to reef fishes and their use of habitat. She is particularly interested in how scientific findings are incorporated into laws and regulations that affect the management and conservation of the organisms that live in the ocean.

She is a creative thinker and a problem solver. Attend the Keynote offering on Monday, May 4<sup>th</sup>, to hear Dr. Coleman's research experiences, how Investigators and Research Administrators may better work together and how scientific findings may benefit management and conservation efforts.



# Morning Concurrent Sessions

Monday, May 4, 2009

10:45 a.m. – 12:00 p.m.

C1

*“Compliance? But I’m in Pre-award!”*

**Track:** Pre-Award

**Location:** St. Andrews Ballroom I

**Presenters:** Barbara Gray, Director of Grants and Contracts, Valdosta State University and Charles Patterson, Ph.D., Associate Vice President for Research, Executive Director, Georgia Southern Research and Service Foundation Georgia Southern University

Your job description says you're responsible for helping faculty find funding and prepare and submit proposals. What may not be included in that description is a reference to compliance. As a pre-award administrator, what do you need to know to do your part to minimize risk to the institution and to ensure efficient management of awards? This session will include discussion of some common, and some not so common, internal and regulatory compliance issues with which pre-award administrators should be familiar. Examples will be presented, and participants will engage in exercises designed to help them spot and prevent potential non-compliance.

C2

*“Material Transfer Agreements: How to Survive the Gauntlet”*

**Track:** Post-Award/Compliance

**Location:** St. Andrews Ballroom II

**Presenters:** Cale Lennon, Ph.D., Assistant Director, Office of Technology Transfer, Emory University and Shannon Walker, Ph.D., Material Transfer Agreement Associate, Office of Technology Transfer, Emory University

An investigator is in dire need of a certain compound in order to collect data for submission of a competing continuation award. He routes to your office a material transfer agreement with Company X. Three months later, the terms of the agreement are still under negotiation; the investigator is furious and blames your office for impeding his research and derailing his ill-fated application. Welcome to the MTA gauntlet! This session will focus on the challenges with managing material transfer agreements and provide strategies and best practices for a successful MTA program. Attendees will have the opportunity to participate in interactive case-studies that demonstrate some of the pitfalls associated with MTAs.

# Morning Concurrent Sessions

Monday, May 4, 2009

10:45 a.m. – 12:00 p.m.

C3

## *“National Science Foundation (NSF) Update”*

**Track:** Federal

**Location:** St. Andrews Ballroom V

**Presenters:** Samantha Hunter, Policy Specialist, Division of Institution & Award Support, National Science Foundation

This session will be a comprehensive review of what is new and developing with the National Science Foundation's programs, policies, people and budgets. Come learn about changes affecting your institution and researchers, new programs of interest, and NSF electronic initiatives.

C4

## *“Training Processes for Research Administrators”*

**Track:** Professional Development/Training

**Location:** St. Andrews Ballroom VI

**Presenters:** Victoria Ratcliffe, Training Coordinator, Virginia Tech

Although in an era of Electronic Research Administration (eRA), little attention has been focused on using e-Portfolio's as a professional development tool for Research Administrators. E-Portfolios are ideal for tracking, documenting, evaluating and assessing employee performance over a period of time. The Office of Sponsored Programs (OSP) at Virginia Tech determined that a need for an e-Portfolio was evident when the existing training program for new employees was not working effectively in documenting and evaluating the employee's performance over time. The previous training consisted of a checklist of core areas that the mentor would go through with the employee; however, there was no documented measurement of the employee's performance and often this checklist was abandoned as the mentor and employee became consumed with daily tasks. To mitigate these issues, OSP embarked on creating a Professional Development e-Portfolio for their Post Award staff. The benefits of using the matrix tool as a Professional Development e-Portfolio are multi-faceted. The most critical benefit is that it serves as a learning record that provides actual evidence of individual's achievement and performance. Employees are provided a combination of instructional resources ranging from websites, print, and training videos on a specific topic and are required to perform assessments. This session will provide a demonstration of the e-Portfolio and open the discussion for other ways to streamline the training process.

# Afternoon Concurrent Sessions & Discussions

Monday, May 4, 2009

**1:30 p.m. – 2:45 p.m. Early Sessions**

*D1*

*“Best Practices in Facilitating the Research with Proposal Development”*

**Track:** Pre-Award

**Location:** St. Andrews Ballroom I

**Presenters:** Martha Taylor, Assistant Vice President for Research, Auburn University

Have you ever wondered what a faculty member goes through when developing a proposal? Or been approached by a junior faculty member seeking input during the development process and hoping that your advice would give them that special "edge" needed to get a proposal funded, especially when budgets are tight? If so, please join us for this lively, interactive session that will be geared toward providing you with the information needed to become a valuable resource to the faculty on your campus.

*C5*

*“NCURA Resources”*

**Track:** Professional Development/Training

**Location:** St. Andrews Ballroom II

**Presenters:** Latasha Johnson, Manager of Membership Services, National Council of University Research Administrators and LaJauna Ellis, Program Manager, School of Electrical and Computer Engineering, Georgia Institute of Technology

This interactive session will provide attendees with details about the wide variety of resources NCURA offers to its members, including training, education and professional development programming, publications, opportunities to network, the Career Center and more. In addition, attendees will hear how peers use these resources to enhance training and education on their campuses, within departments and for their own professional and career development.



# Afternoon Concurrent Sessions & Discussions

Monday, May 4, 2009

1:45 p.m. – 3:00 p.m. Early Sessions

C6

*“Building a Research Administrator from Scratch Without Creating Frankenstein's Monster”*

**Track:** PUI

**Location:** St. Andrews Ballroom V

**Presenters:** Pamela Napier, Associate Director, Office of Sponsored Programs, Western Kentucky University

A battle PUIs often face is that of attracting experienced employees to fill vacancies as the office grows. Research administrators with experience can work for larger institutions that can pay them more. These valuable employees can move where they want, when they want. So you might as well just go ahead and build your own research administrator from scratch. This session covers how to word a job advertisement so that you get applicants with transferable knowledge, skills and abilities, who also want to stay in the (often small) city where your institution is located. We will also cover revealing questions to ask during the interview; and the basics of how to begin to train a new employee who may never have even heard of the phrase "Sponsored Programs" before. Plan on sharing your innovative strategies for coping with this battle, too.

D2

*“Cost Transfers”*

**Track:** Post-Award/Compliance

**Location:** St. Andrews Ballroom VI

**Presenters:** Mo Valentine, MPA, CRA, Director, Institutional Review Board, University of Arkansas for Medical Sciences

With the intensity of research compliance on university campus today, this topic is at the forefront of discussion and is a concern for research administrators across the board. Come participate in a lively discussion on costs transfers and hear different institutional perspectives on how to achieve effective cost transfer policies, procedures and monitoring.



# Afternoon Concurrent Sessions

Monday, May 4, 2009

**3:15 p.m. – 4:30 p.m. Late Sessions**

C7

*“Project Management for Departmental Research Administrators”*

**Track:** Departmental

**Location:** St. Andrews Ballroom I

**Presenters:** Bettie Cook, Grants Specialist, University of Arkansas for Medical Sciences and Brandy Harris, Grants Administrator, University of Arkansas for Medical Sciences

So, the award notice has been received and the central office has sent you the financial account number to start spending. What now? This session will describe some practical solutions for Departmental Research Administrators responsible for the day to day task managing aspects of the project and how to keep it together.

C8

*“Effort Reporting Hot Topics”*

**Track:** Post-Award/Compliance

**Location:** St. Andrews Ballroom II

**Presenters:** Doyle Smith, Director, Maximus, and Jill Frazier Tincher, Senior Director of Medical Research Administration and Sponsored Programs Education, University of Miami

In this session, attendees will hear hot topics and best practices related to the challenging process of effort reporting on sponsored programs. Effort reporting is one of the hot compliance issues/concerns around the country. This session will describe some of those hot topics and provide great guidance on best practices.

*“Research is to see what everybody else has seen, and to think what nobody else has thought”*  
*Albert Szent-Gyorgyi*



# Afternoon Concurrent Sessions

Monday, May 4, 2009

3:15 p.m. – 4:30 p.m. Late Sessions

**D6\***

*“Out of the Box: New Ideas for Faculty Proposals”*

**Track:** Pre-Award

**Location:** St. Andrews Ballroom V

**Presenters:** Cynthia White, Director, Office of Sponsored Programs, Belmont University and Charles Patterson, Ph.D., Associate Vice President for Research, Executive Director, Georgia Southern Research and Service Foundation Georgia Southern University

How many times have you held the same old brown bag lunches, day long workshops with consultants and one-to-one meetings for faculty only to get one or two nibbles? What is a research administrator to do? Go on a blind date, of course! Getting to know other faculty (be them in your institution or with other institutions) is at times, the biggest challenge and yet, has a huge potential for success. Find out about how to set up a Speed Dating (Collaborating) Workshop for your faculty, what are the pitfalls and what you can expect. Real life example will be used!

*\*Changed from Concurrent Session “C9” to Discussion Group “D6”*

**C10**

*“National Institutes of Health (NIH)”*

**Track:** Federal

**Location:** St. Andrews Ballroom VI

**Presenters:** Carol Wigglesworth, Policy Analyst, Office of Policy for Extramural Research Administration, National Institutes of Health

This session will review NIH policy updates, ongoing changes in requirements to apply, compete and receive NIH grants, along with information on the NIH budget and legislation affecting NIH.



*Monday, May 4, 2009*

## **Monday Evening Dinner Groups**

**6:00 pm**

**Hotel Main Lobby**

Sign up to have dinner with your friends and colleagues at local restaurants. Dinner Group sign up sheets will be available at the NCURA Region III Registration area. A Regional Volunteer will coordinate transportation to and from Monday Evening Dinner Group locations.

## **Wanna Play? Hospitality Suite Open**

**Let's have fun!**

Board games & Card games

**Suite hour:** 8:00 p.m. – 12:00 a.m.

**Suite Location:** Ambassador Suite  
6<sup>th</sup> Floor Main Building

*Region III Hospitality Suite is sponsored by  
our Gold Level Sponsor, American Appraisal.*



# Tuesday, May 5, 2009



## Continental Breakfast

**7:30 a.m. - 9:00 a.m.**

St. Andrews Ballroom Foyer

Seating available in Spanish Moss



## Morning Concurrent Sessions & Discussion Groups

**9:00 a.m. - 10:15 a.m.**



## Morning Break

**10:15 a.m. - 10:30 a.m.**

St. Andrews Ballroom Foyer



## Late Morning Concurrent Sessions & Discussion Groups

**10:30 a.m. - 11:45 a.m.**



## Lunch

**12:00 p.m. - 1:00 p.m.**

Grand Lagoon Ballroom



## Afternoon Concurrent Sessions

**1:30 p.m. - 2:45 p.m.**



## Afternoon Break

**2:45 p.m. - 3:00 p.m.**

St. Andrews Ballroom Foyer



## Late Afternoon Concurrent Sessions & Discussion Groups

**3:15 p.m. - 4:30 p.m.**



# Morning Concurrent Sessions & Discussions

Tuesday, May 5, 2009

9:00 a.m. – 10:15 a.m. Early Sessions

C11

*“Re- Inventing Your Subcontract Process”*

**Track:** Post-Award/Compliance

**Location:** St .Andrews Ballroom I

**Presenters:** Juanita Syljuberget, Contract and Grant Administrator II, Office of Sponsored Programs, Auburn University and Nathan Haines, Director, Huron Consulting Group

Are you prepared for the requirements of the Federal Financial Accountability and Transparency Act (FFATA) and American Reinvestment and Recovery Act (ARRA)? The first step in preparation is making sure your subcontract process is effective, efficient, and compliant. We'll review ways universities are re-inventing their subcontract process and shaving weeks off the time it takes to execute an agreement. We'll also spend some time in open discussion about what other universities are doing to prepare for FFATA and ARRA.

C12

*“Intellectual Property Primer: Understanding the Legal Fundamentals of IP and its Implications on Sponsored Research”*

**Track:** IP/Contracting

**Location:** St .Andrews Ballroom II

**Presenters:** Lauren A. Wilson, J.D. , Senior Associate Director, Office for Sponsored Programs, The University of Alabama and Rick Swatloski, Ph.D., Licensing Associate, Office for Technology Transfer, The University of Alabama

In this session, attendees will be introduced to the legal fundamentals of intellectual property and the basics of patents, copyrights and technology transfer. With this knowledge, attendees will gain a better understanding of the most common types of intellectual property developed under sponsored research programs and the business implications IP can have on sponsored research if not addressed property.



# Morning Concurrent Sessions & Discussions

Tuesday, May 5, 2009

## 9:00 a.m. – 10:15 a.m. Early Sessions

### C13

#### *“Everything You Need Your PI to Know”*

**Track:** Departmental

**Location:** St. Andrews Ballroom V

**Presenters:** Patty Gminski, CRA, Assistant Department Administrator, Department of Pathology, University of Arkansas for Medical Sciences, and Mo Valentine, MPA, CRA, Director, Institutional Review Board, University of Arkansas for Medical Sciences

Is the New Faculty Orientation at your institution insufficient to help guide newbie's through the research organization maze? This session will provide practical tips and tools any department research administrator can implement to assist the faculty in their department

### D3

#### *“Time Management: Hey, do you have a tool that I can borrow to fix my multiple agency deadline problem?”*

**Track:** Pre-Award

**Location:** St. Andrews Ballroom VI

**Presenters:** Rebecca Puig, Assistant Director, Division of Sponsored Research, University of South Florida

Need some advice on prioritizing your deadlines or how to better manage those ever-growing pre-award workloads? Maybe you just want to share with us your tips on how to be better organized and more efficient. Please join us to talk about what seems to work best (or worst) for you. You may even pick up some time saving tips and organizational skills to use to keep your stress level down and your productivity up! See you there!



# Morning Concurrent Sessions & Discussions

Tuesday, May 5, 2009

**10:30 a.m. – 11:45 a.m. Late Sessions**

**C14**

*“Responsible Conduct of Research”*

**Track:** Post-Award/Compliance

**Location:** St. Andrews Ballroom I

**Presenters:** Kathy Bir, Manager, Office for Research Compliance, The University of Alabama

In this session, attendees will be introduced to the best practices in Responsible Conduct of Research. With this knowledge, attendees will increase their knowledge and facilitate the practice of responsible research.

**C15**

*“Everything You Ever Wanted to Know About CRA”*

**Track:** Professional Development/Training

**Location:** St. Andrews Ballroom II

**Presenters:** Jennifer Rosa, Research Business Manager, The Children’s Hospital of Philadelphia and Joan Campbell, Executive Director, Research Administrators Certification Council

Have you ever thought about becoming a Certified Research Administrator (CRA)? Are you a CRA? Is there any benefit to becoming certified? At this session, attendees will have these and many other questions answered by your colleagues- those certified and those who aren't .

*“Research is formalized curiosity. It is poking and prying with a purpose.”*  
Zora Neale Hurston



# Morning Concurrent Sessions & Discussions

Tuesday, May 5, 2009

10:30 a.m. – 11:45 a.m. Late Sessions

*D4*

*“Visa Issues and Cost-From a Departmental Perspective”*

**Track:** Departmental

**Location:** St. Andrews Ballroom V

**Presenters:** Velera Pate, Financial Manager II, School of Physics, Georgia Institute of Technology and Kay Gilstrap, Assistant Director, Financial Operations, Georgia Institute of Technology

Come join us in what promises to be lively discussion on ways various departments are dealing with visa issues and costs. Have any of your faculty members tried to include visa applications fees and postage on a travel reimbursement? How is your departmental handling the cost burden? Bring your horror stories and your success stories!

*C16*

*“Federal Demonstration Partnership (FDP) Update”*

**Track:** Federal

**Location:** St. Andrews Ballroom VI

**Presenters:** Denise Clark, Assistant Vice President for Research Administration and Advancement, University of Maryland-College Park and Cynthia Hope, Director, Office of Sponsored Programs, The University of Alabama

The Federal Demonstration Partnership (FDP) celebrated the implementation of Phase V in September 2008. This session offers a retrospective view of past successes and the outlook for priorities for the Phase V. New leadership of the FDP will be available to answer questions.



# Afternoon Concurrent Sessions

Tuesday, May 5, 2009

**1:30 p.m. – 2:45 p.m. Early Sessions**

**C17**

*“Two sides of the Same Coin: Central & Departmental Administration working together”*

**Track:** Pre-Award

**Location:** St. Andrews Ballroom I

**Presenters:** Marc McGee, Director, Mississippi State University and LaJauna Ellis, Program Manager, School of Electrical and Computer Engineering, Georgia Institute of Technology

Are you looking to understand how department and central administration work together? Who has what responsibility and what authority and who does what? This session will introduce you to a better understanding of how these two administrative offices work together.

**C18**

*“Communicating with Style”*

**Track:** Departmental

**Location:** St. Andrews Ballroom II

**Presenters:** Renea Brazil, CRA, Grant Administrator, Department of Pediatrics, University of Arkansas for Medical Sciences and Mo Valentine, MPA, CRA, Director, Institutional Review Board, University of Arkansas for Medical Sciences

Do you have trouble giving your PI bad news? Do you have PIs who make you nervous? Do you question the most appropriate way to communicate with your customers? This session will discuss some practical tools for maintaining good relationships when the stakes are high and emotions get in the way.

*“Inquiry is fatal to certainty” Will Durant*



# Afternoon Concurrent Sessions

Tuesday, May 5, 2009

1:30 p.m. – 2:45 p.m. Early Sessions

C19

*“The Roth Case: Export Control”*

**Track:** IP/Contracting

**Location:** St. Andrews Ballroom V

**Presenters:** David Brady, Director, Office of Export and Secure Research Compliance, Virginia Polytechnic Institute and State University and Robin Witherspoon, Export Control Officer, Office of Research, University of Tennessee

In September 2008, an emeritus faculty member of the University of Tennessee was convicted of 17 felonies relating to violations of International Traffic in Arms Regulations (ITAR), most of them taking place on campus at the university. The violations occurred during university sponsored research activities, and involved foreign graduate students. During this concurrent session, using court documents, interactions with the FBI enforcement case agent, and personal experience, we will share our experiences about the Roth Case and facilitate discussions on what institutions can do to protect themselves, avoid this type of situation and/ or manage this situation if it does occur at your institutions.

C20

*“Research Award Strategies for Small Arms Research”*

**Track:** Federal

**Location:** St. Andrews Ballroom VI

**Presenters:** Dr. Carl Frantz, Senior Project Advisor, University of Louisiana at Lafayette and Mr. Frank Puzycki, Research Program Director, National Small Arms Center

The National Small Arms Consortium of federal, industrial and university partners is designed to facilitate innovation and research which leads to development of products and approaches to increase the effectiveness of American soldier. This session presents a new approach to involve university researchers more effectively in this process. This will lead to increased opportunities for federally or industrially sponsored university research, including federal agency and/or industrial support for federal "plus-ups." University researchers have expertise and insights that could help improve small arms, ammunition, and other equipment and supplies that are now used or that could be used by military personnel in training and ground combat. Some investigators may also be involved in cutting edge research that could have military application in the small arms arena. This session will present a new avenue for interested universities and their investigators to learn about small arms research needs and potential industrial collaborative partners. The session will also provide an opportunity for attendees to make suggestions for improving the approach to further increase collaboration and opportunities for funding.

# Afternoon Concurrent Sessions & Discussions

Tuesday, May 5, 2009

## 3:15 p.m. – 4:30 p.m. Late Sessions

### C21

#### *“Clinical Trial Agreements: The Basics of Terms and Conditions/Budgets”*

**Track:** IP/Contracting

**Location:** St. Andrews Ballroom I

**Presenters:** Ronald F. Polizzi, MBA, CRA, Associate Director, Contracts, Thomas Jefferson University and Samuel Dilanni, MS, Director of Administration and Finance, Radiation Oncology Department, School of Medicine, University of Pennsylvania

Life's a BEACH in Panama City! Don't go into battle with just your sombrero and poncho. Protect your institution by wearing full battle armor. Bring to the table your weapons, shields and force fields in order to negotiate and defend those preferred terms in your clinical trial agreements. The negotiation of the clinical trial agreement is a complex process that involves difficult terms, budget preparation and payment schedules. How do we defend the rights and concerns of the institution while trying to meet the time demands of the sponsor? What are confidentiality, indemnification, intellectual property, subject injury, and publication, and how do we negotiate them? What are some those "other terms" that sometimes slow down the process? How does the institution ensure that all costs are accounted for in the budget? What are your costs? What is an appropriate payment schedule to ensure the institution can cover its costs and manage cash flow?

### D5

#### *“Compliance at a PUI: Same Issues, Different Challenges”*

**Track:** PUI

**Location:** St. Andrews Ballroom II

**Presenters:** Jeanne Ware, Director, Office of Research Programs and Services, New College of Florida and Nichole Van der Berg, Coordinator, Office of Research Programs and Services, New College of Florida

Compliance issues are not just for the Research I universities. PUI's have the same risks as any other institution and usually have more challenges associated with the institutional culture and limited resources. How are we to cope? Come share your insights, examples, and ideas about IRB, IACUC, IBC and others.

# Afternoon Concurrent Sessions & Discussions

Tuesday, May 5, 2009

**3:15 p.m. – 4:30 p.m. Late Sessions**

**C22**

*“Developing Training Programs for Departmental Grant Administrators”*

**Track:** Departmental

**Location:** St. Andrews Ballroom V

**Presenters:** Maria Valero-Martinez, CRA, Manager, Office of Research Education & Training, University of Miami and Victoria Ratcliffe, Training Coordinator, Virginia Tech

Who goes to college to become a departmental grants administrators? No one. So, how do you effectively train departmental grants administrators on the nuances associated with sponsored programs information and processes? This session will address the issue of developing training programs specifically for Departmental Grants Administrators.

**C23**

*“Terminations and Stop Work Orders”*

**Track:** Pre-Award

**Location:** St. Andrews Ballroom VI

**Presenters:** Holland Carley, Assistant Director, Vanderbilt University and Tina Cunningham, Associate Administrator, Mississippi State University

Terminations and stop orders are inevitable in any sponsored research setting. While work on the sponsored project is being stopped, in many ways the work has just begun. This session will take you through the items to be considered and necessary actions to take when presented with a termination or stop work order. We will also have an open discussion about the options available, and tips for a more amenable resolution. Specific examples of terminations/stop work orders will be presented with a discussion to follow for possible resolutions.



Tuesday, May 5, 2009

# CINCO DE MAYO MARGARITA

## Dinner and Party

6:00 p.m. – 10:00 p.m.

St. Andrews Ballroom

Beer, Wine, Soft Drinks and  
Water Provided.

Frozen or On-The-Rocks  
Margarita, our signature  
Cinco de Mayo drink, can be  
purchased for \$7.



## Poker Run For Fun!

For those who don't know how to play Poker, have no fear. This game is about LUCK and your ability to network. By the way, you can also stop by the Hospitality Suite on Monday night to hone up on your card skills. Monday is Board Games and Card Night in the Hospitality Suite.

### When and Where and How Much:

The Dealer's Booth will be open on Tuesday Night at 6:00 pm. outside of the **St. Andrews Ballroom**. Stop by and randomly select 5 cards. The cost to participate is \$10 per hand. A portion of your entry fee will be counted towards your state's contribution to Shelter Box. The remaining portion will go towards the winning cash prizes. Winners will be announced during the dinner/party.

### Prizes:

First Place - \$50 cash price  
Second Place - \$20 cash price

Details on how to play will be included in your registration package.

*Special thanks and appreciation to our  
Tuesday Dinner and Party Sponsor, Elsevier*



# Wednesday, May 6, 2009



## **Breakfast & Regional Business Meeting**

**8:30 a.m. - 10:00 a.m.**

St. Andrews Ballroom I and II



## **Panel Discussion**

**10:15 a.m. - 11:30 a.m.**

St. Andrews Ballroom V

**Pamela Napier**, Associate Director, Office of Sponsored Programs,  
Western Kentucky University

**Dan Hamlin**, Executive Vice President for Sales and Senior Executive  
Consultant, Éclat Consulting, LLC

Come join your esteemed colleagues as we address the hot topics surfacing around the country. Listen to a lively presentation and discussion on ARRA/Stimulus funding, institutional changes as a result of budget cuts, hiring freezes, travel freezes, etc. In addition, this panel will discuss other hot topics in today's research administration environment. Learn from the experiences of others. And, share information with your colleagues because we are all in this together.

Participants will learn about hot topics within research administration and gain insight in how they may improve processes within their institutions.



## **Adjourn**

**11:45 a.m.**



# Regional Committees

## 2008-2009 Regional Officers

**Chair - Tony Ventimiglia**, Auburn University  
**Chair-Elect - Jill Frazier Tincher**, University of Miami  
**Secretary - Bruxanne Hein**, Coastal Carolina University  
**Treasurer - Cynthia Hope**, The University of Alabama



## Committees

### Nominations and Elections

**Chair - Beryline Temples**  
University of Central  
Arkansas  
**Kathy Bir**  
The University of Alabama  
**Karen Holliman**  
Duke University Medical  
Center  
**Menia Lee**  
University of South  
Carolina  
**Michael Nichols**  
Emory University  
**Debbie Smith**  
University of Tennessee  
Health Science

### Newsletter Contributions

**Sam Gannon**  
Vanderbilt University  
Medical Center  
**Laura Letbetter**  
Kennesaw State University

### Hospitality

**Chair - LaJauna Ellis**  
Georgia Institute of  
Technology  
**Amanda Green**  
University of New Orleans

### Membership and Awards

**Chair - Lori Brown**  
University Central Florida  
**Sonja Avery**  
University of North Florida  
**Jennifer Mahler-Krupp**  
Duke University  
**Rebecca Puig**  
University of South Florida  
**Stephanie Smotherman**  
Vanderbilt University  
Medical Center

### Site Selection

**Chair - Michelle Powell**  
Georgia Institute of  
Technology  
**Rob Roy**  
Board of Regents (State of  
GA)  
**Diane Anderson**  
Auburn University  
**Melissa Mattison**  
University of South  
Carolina

### Volunteer Coordinator

**Riddick Smiley**  
East Carolina University





# Where do we stand?

**We believe where you stand in your profession often depends on where you sit.**

Since 1896, American Appraisal has dedicated itself to remaining at the forefront of the valuation profession. Today that commitment is also reflected by our passion to lead our profession from the podium, in print and through significant participation in many of our profession's governing bodies and associations, including NCURA, SECA/WECA/NECA, NACUBO, GASB, FASB, OMB, SRA, The National Property Management Association and The American Society of Appraisers.

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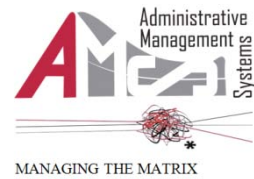
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# Exhibitors



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# Hotel Maps



**GOLF VILLAS ROOM NUMBERS**

<b>AUGUSTA NATIONAL</b>	<b>DORAL</b>
2102 - 2112	2141 - 2152
2202 - 2212	2241 - 2252
2302 - 2308	2341 - 2348
2403 - 2406	2443 - 2446
<b>BALTUSROL</b>	<b>PIRESTONE</b>
2121 - 2126	2171 - 2176
2221 - 2226	2271 - 2276
<b>CYPRESS POINT</b>	<b>ORANGE LAKE</b>
2131 - 2136	2181 - 2192
2231 - 2236	2281 - 2292
<b>EASTGATE</b>	2381 - 2348
2161 - 2166	2483 - 2486
2261 - 2266	

**HOTEL ROOM NUMBERS**

<b>DOGWOOD</b>	<b>MAGNOLIA</b>
1127 - 1330	1121 - 1366

For More Information call 850.236.6000

**30° BLUE**  
Call 850.236.1115  
For Reservations & Info

**KINGFISH**  
Call 850.236.6075  
For Specials & Info

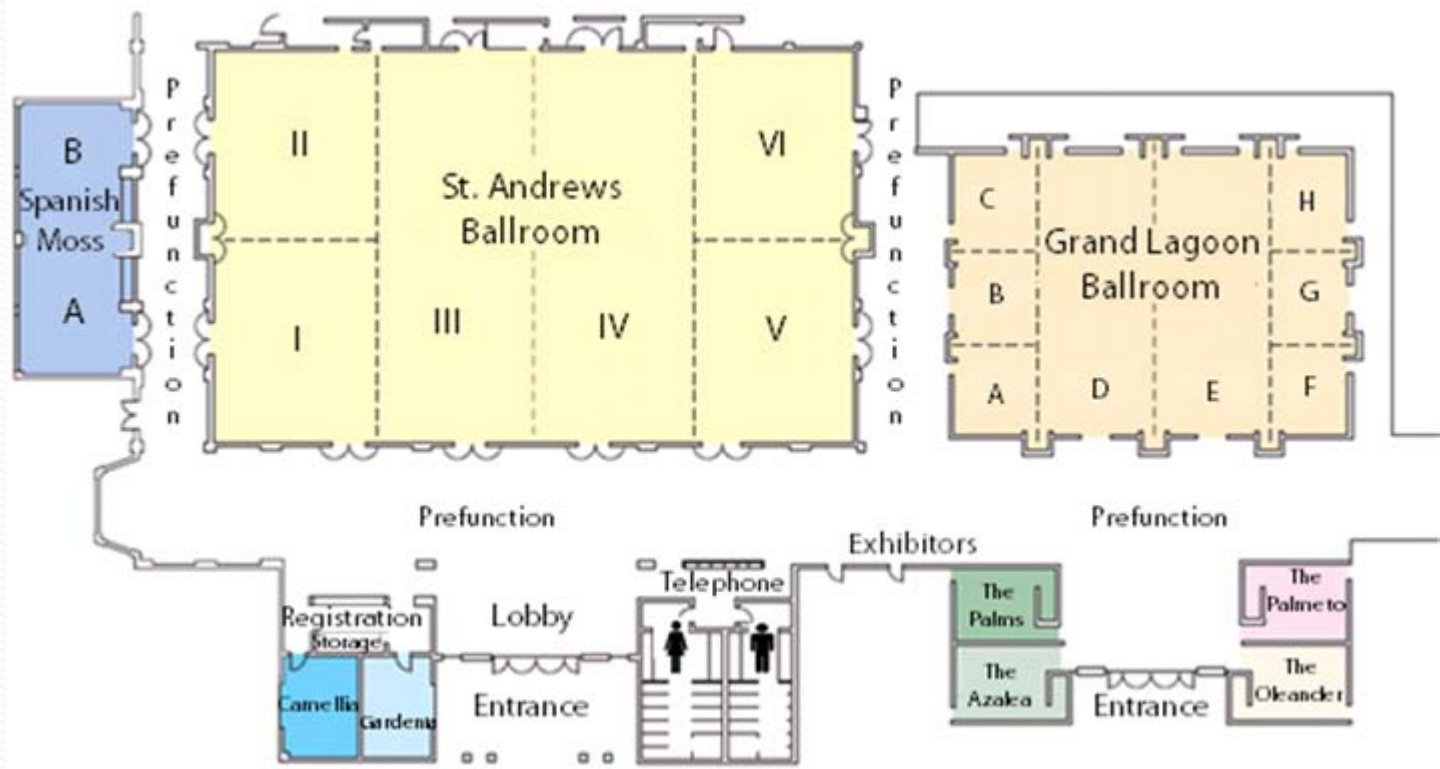
**CLUB 19**  
Call 850.235.6950  
For Menu & Specials

**SERENITY SPA**  
Call 850.236.6028  
For Spa Appointments

**MARRIOTT BEACH**  
Call 850.235.6950  
For Tee Times & Other Info



# Hotel Maps



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# Program at-a-Glance

## SUNDAY, MAY 3, 2009

7:00 a.m. – 8:30 a.m. CONTINENTAL BREAKFAST (Workshop Participants only)

8:30 a.m. – 5:00 p.m. FULL-DAY WORKSHOPS

W1 Increasing Transfer in Training: Successful Approaches to Training for Research Administrators

W2 Introduction to Pre-Award

8:30 a.m. – 12:00 p.m. MORNING WORKSHOPS

W3 The Complete Award Administrator: A-21, A-110, A-133 and Good Coffee

W4 Negotiating for Mutual Satisfaction

12:00 p.m. – 1:00p.m. LUNCH (Workshop Participants only)

1:30 p.m. – 5:00 p.m. AFTERNOON WORKSHOPS

W5 Sub-awards and Monitoring From Writing the Proposals to Project Closeout- How to Manage Risk

W6 Beyond the Fundamentals of Post Award Issues

5:15 p.m. – 6:00 p.m. ORIENTATION FOR NEWCOMERS

6:00 p.m. – 7:00 p.m. WELCOME RECEPTION

8:00 p.m. – 12:00 a.m. HOSPITALITY SUITE

## MONDAY, MAY 4, 2009

7:30 a.m. - 9:00 a.m. CONTINENTAL BREAKFAST

9:00 a.m. -10:30 a.m. WELCOME AND KEY NOTE ADDRESS

10:45 a.m. -12:00 p.m. MORNING CONCURRENT SESSIONS

C1 Compliance? But I'm in Pre-award!

C2 Material Transfer Agreements: How to Survive the Gauntlet

C3 National Science Foundation (NSF) Update

C4 Training Processes for Research Administrators

12:00 p.m. - 1:00 p.m. LUNCH

1:30 p.m. - 2:45 p.m. EARLY AFTERNOON CONCURRENT SESSIONS AND GROUP DISCUSSIONS

D1 Best Practices in Facilitating the Research With Proposal Development

C5 NCURA Resources

C6 Building a Research Administrator From Scratch Without Creating Frankenstein's Monster

D2 Cost Transfers

3:15 p.m. - 4:30 p.m. LATE AFTERNOON CONCURRENT SESSIONS AND GROUP DISCUSSIONS

C7 Project Management for Departmental Research Administrators

C8 Effort Reporting Hot Topics

D6 Out of the Box: New Ideas for Faculty Proposals (Changed from Concurrent Session C9 to Discussion Group D6)

C10 National Institutes of Health (NIH)

6:00 p.m. DINNER GROUPS

8:00 p.m.- 12:00 a.m. HOSPITALITY SUITE

## TUESDAY, MAY 5, 2009

7:30 a.m. – 9:00 a.m. CONTINENTAL BREAKFAST

9:00 a.m. -10:15 a.m. EARLY MORNING CONCURRENT SESSIONS AND GROUP DISCUSSIONS

C11 Re- Inventing Your Subcontract Process

C12 Intellectual Property Primer: Understanding the Legal Fundamentals of IP and Its Implications on Sponsored Research

C13 Everything You Need Your PI to Know

D3 Time Management: Hey, Do You Have a Tool That I Can Borrow to Fix My Multiple Agency Deadline Problem?

10:30 a.m. – 11:45 a.m. LATE MORNING CONCURRENT SESSIONS AND GROUP DISCUSSIONS

C14 Responsible Conduct of Research

C15 Everything You Ever Wanted to Know About CRA

D4 Visa Issues and Cost-From a Departmental Perspective

C16 Federal Demonstration Partnership (FDP) Update

12:00 p.m. - 1:00 p.m. LUNCH

1:30 p.m. -2:45 p.m. EARLY AFTERNOON CONCURRENT SESSIONS AND GROUP DISCUSSIONS

C17 Two sides of the Same Coin: Central & Departmental Administration Working Together

C18 Communicating With Style

C19 The Roth Case: Export Control

C20 Research Award Strategies for Small Arms Research

3:15 p.m. – 4:30 p.m. LATE AFTERNOON CONCURRENT SESSIONS AND GROUP DISCUSSIONS

C21 Clinical Trial Agreements: The Basics of Terms and Conditions/Budgets

D5 Compliance at a PUI: Same Issues, Different Challenges

C22 Developing Training Programs for Departmental Grant Administrators

C23 Terminations and Stop Work Orders

6:00 p.m. - 10:00 p.m. DINNER/PARTY & POKER RUN FOR FUN

8:00p.m.-12:00 a.m. HOSPITALITY SUITE

## WEDNESDAY, MAY 6, 2009

8:30 a.m. – 10:00 a.m. BREAKFAST AND REGIONAL BUSINESS MEETING

10:15 a.m. -11:30 a.m. PANEL DISCUSSION

11:45 a.m. ADJOURN



# NCURA Region III

