1. **Introductions of Members and Guests** (*Debbie Talley*) [3:00 – 3:05]

   Meeting started at 3:00 p.m.

   Debbie thanked the Ford School of Public Policy for hosting the meeting. The group went around the room for introductions.

2. **Presentation**: RAAC Communications Subcommittee Update (*Becky O’Brien*) [3:05 – 3:35]

   Becky O’Brien presented on what the RAAC Communications subcommittee has been working since the last update in April.

   Goals of RAAC Communications:
   
   - Identify and assess communication methods for U-M Research Administration
   - Work to develop and Improve Systems
   - Recommend Best Practices
   - Facilitate and foster communications to Research Administrators

   New Members:
   
   - Jeff Alber and Kellie Buss (ORSP) - replacing Julie Olivero.
● Dean Michalak (Sponsored Programs) - replacing Leslie Chavez
● Cathy Liebowitz joined from ISR.
● Corey Turner is moving from RAAC Communications to the RAAC Process subcommittee.
● Tina Wells is now the UMTRI representative (was ISR)

Accomplishments:

● Onboarding of new members.
● Worked on two RAN Meetings: May 17, 2017 and October 24, 2017

May meeting - shorter meeting with the UMOR staff recognition award ceremony following.
  ○ Featured presentation: Small Company Innovation Program (SCIP)
  ○ 122 in-person attendees; 38 remote viewers
  ○ Emcee: Daryl Weinert
  ○ 55 YouTube views after the meeting

October 24, 2017: Finance Theme
  ○ Featured presentations: Subawards and Hybrid Purchase Orders, Facilities & Administrative (F&A) Costs
  ○ 121 in-person attendees, 83 remote viewers
  ○ Emcee: Debbie Talley
  ○ 27 YouTube views after the meeting

● Third time using live streaming service with new vendor. Works well, and is not free, but not too expensive.
● Post RAN meeting survey:
  ○ 44 responses (43 attended, 1 unattended)
  ○ 21% response rate
  ○ Majority rated event Very Good or Excellent.
● Averaging 200 in-person for October meetings. The May 2016 meeting had less attendance due to being on a Friday, and there are less presentations in May generally, with having the UMOR awards.
● February attendance has been consistent.

In Progress:

● RAN attendance Tracking 2.0 - attendance stats to use for improving 2018 meetings.
● Informal Peer-to-peer Sharing Forum.
  ○ Created the group in Google Group. Tested functionality (i.e., adding users, etc.)
  ○ Explored “invite” and “direct add”
  ○ Potential to use chat function for RAN remote attendees
  ○ Categorizing capabilities (topics)
  ○ Sorting capabilities.
  ○ Browser compatibility
● Next: looking for 15 volunteers to do more testing.
● Additional testing with topics, categories, and organization.
● Need 85 more volunteers in January. Expand trial to 100 names.
● Finalize with list of about 900-3,000 names.
Kathy asked if this group is similar to U-M Business Intelligence Google Community. Becky responded that this is not a listserv group, more of a web-based group. This group is sharing practices. Have topics and ask questions to the group for advice, templates, etc.

Beth asked if the group will be moderated at all. Becky answered that we plan to have community guidelines (i.e., rules), but hard to moderate. Make sure we will indicate questions are not policy, but information exchange.

This informal sharing forum will only be for U-M community, and need to be invited. It will not be searchable on the web. Daryl suggested to talk to the Office of General Counsel (OGC) to make sure we understand the risks.

It is similar to the listserv function where people post questions and the community gives answers based on their experience. We chose Google groups because there are already ITS policies and contractual language in place with Google.

Kathy suggested that posters identify their school with their question as the answer may vary by unit. Can share best practices and should be a positive experience for information exchange, not used for making policies.

Craig asked if this will be ready to announce at RAN meeting in May. Becky and Constance responded maybe, if we get the volunteers and testing completed.

The informal peer-to-peer sharing forum will be an addition to our communication tool set (website, communication newsletters, etc.).

ORSP Webpages:

- Working with RAAC Metrics for current and pending support template.
- Dashboard for RAAC Metrics
- Possible portal for Project Review groups. Similar to the Curtis Center that you would use in reviews, statistical analysis, etc. Location of where resources are available on Campus. Lori mentioned there is a tab on UMOR webpage (Resources for Research) that could be used for this. Craig suggested to contact Jill Jividen for resources we could use from their organization. Use for grant writing support. Would like to provide evaluation services on the portal.

MICHR also has a portal that may be useful. There is a research development core group on campus looking into something similar to see where this information lives. Would like to provide for faculty proposal development. Becky will reach out to group to see how we can collaborate.

Alex suggested to see metrics around how much faculty will use it before we put too many resources into producing the portal. Becky said it was asked by Maureen Martin in Foundation Relations if the resources are out there, and where are they located. Should there be a portal for all the information?

Daryl suggested to use UMOR website or project lifecycle and plug in information to various areas.

Cost Share Webpage:

- Initial working group went through content and made first pass of revisions.
• Reviewed and completed initial update of cost share webpages (ORSP & UMOR).
• Award system necessitated related work from a separate group to review and separate out different types of commitments. Put on hold until all groups provided information.
• Website updates to match eRPM changes.
• Web page is now up to date.

Next Steps:
• Adding FAQs and Resources sections to cost share webpage
• Guide for developing task group for webpage review process.

Ongoing Work:
• Plan and execute engaging and relevant RAN meetings.
• Solicit and provide feedback to continue development of new research enterprise website.
• Develop ideas/content for RAP newsletter.

Debbie reminded committee the need for informal peer-to-peer sharing forum volunteers and email to RAAC Communications subcommittee.

3. **ITS Update (Cathy Handyside)**  
   [3:35 – 3:50]

eResearch Proposal Management - two updates coming in 2 weeks:

SF424 (Grants.gov) update:
• Support for NIH FORMS E. Plan was to have the forms available Thanksgiving weekend, however, problems were found and should be available this weekend.

eRPM System update:
• Update instructions for Grants.gov submissions not supported in eRPM.
  ○ Transition from Adobe Forms to Workspace: A few forms are not supported in eResearch and in the past needed Adobe to forward to Grants.gov. Workspace is required to use if forms not supported in eResearch. December 11, 2017 will be when information will change and available for Workspace training.
• Update external IRB and Clinical Trial questions and updating the help language.

December 2, 2017 testing:

• eRPM SF424 update scheduled.
  ○ More forms are being transitioned to new web-based format
  ○ Enhanced subaward Import Functionality
    ■ No version limitation on the subaward for what can be imported. The subaward form can be an older version and import into R&R Subaward Budget V1.4
    ■ Known issue with Subaward Form V1.4 that required you to delete extra rows prior to import.
• R&R Other Project Information Form:
  ○ Corrected the missing attachments on the generated PDF.
  ○ Cannot “order” the attachments.
• Change to Information copied from PAF information into Grants.gov Forms
  ○ We are no longer able to copy the Human Subjects Pending indicator or the HUM Expiration Date from the PAF into the Grants.gov forms due to the new form format.
○ The data will need to be typed in manually in the SF424.

All updated forms will be released Monday, December 2 and will need to be used for January 25, 2018 submissions.

Kathy asked if there are other means to have an internal form for faculty to use as they don’t go into Grants.gov. Send “additional” questions from pull-down menus on web-based forms. Cathy will look into it. Melissa suggested to look at NIH site and provide transfer questions/definitions onto a word document to give to faculty.

Faculty are not use to using IRB before submission and also need to address. “Intervention” in NIH will be the issue. Does not necessarily mean it is a clinical trial, but may have to fill out IRB.

Communications subcommittee explore if anyone has completed making a word document of new questions to use. If not, see how we can tackle the new forms for faculty. Daryl suggested get a task group to get it done.

4. **ORSP Update** *(Craig Reynolds)*  

January 25, 2018 is date when FORMS-E have to be used. Constance/Colleen Vogler working on instructional video.

Grants.gov Workspace:

- Requires RA to have an account. Is a two-step process. Anyone can create account (with U-M DUNS number) but does not give ability to manage a workspace application. ORSP needs to grant access.
- Need to request ORSP action in PAF (only need to do once) to have ORSP grant managed workspace application.

Q: Can we request ORSP action during the Proposal Preparation stage?  
A: Cathy said you can post a comment, but “request” option not available.

Q: Is it possible to have ORSP add all RAAC committee for access to Grants.gov Workspace?  
A: Craig not sure if we have the bandwidth, and a vast majority will be supported by eRRPM.

Deadline Policy:

- Daryl and Craig will present to Academic Programs Group December 13, 2017.  
  - Jack Hu discussed with the Provost, and Provost was supportive.
- Will have kickoff working group meeting on December 11, 2017 (working group consists of members from Executive Committee and small colleges/schools) working on eRPM requirements, etc.
  - September 1, 2018 - soft rollout
  - June 1, 2019 - hard launch

Final Deadline Policy:

- Four business days before sponsor deadline. - full review (institutional and sponsor policy requirements).
- Two-three days before sponsor deadline - limited institutional review. Can request an extension for an additional business day (one day before sponsor deadline).
Anything submitted day of deadline will not be submitted.

Updates:
- Two new PRs - Caitlin Jost (Private Sponsors Team) and Danielle Marchelletta (Government Sponsors Team)
- One open position in Government Sponsors Team (Amy Hollihan transitioning into Clinical Trials).
- Marie Turner (Support Team) is back on a temporary basis.

5. **Sponsored Programs Update** *(Debbie Talley)*

   **Single Audit:**
   - Currently going on and working with PWC on PI questionnaire. Current version has 66 questions, but mostly central office-related. Going to try and get down to 16 questions.
   - Goal to finalize this week and will go to the 15 projects next week.
   - No issues to date on Single Audit related to research and development. Some related to financial aid, but separate and not related to 15 projects.

   **NSF Audit:**
   - Still working with OIG to accept our responses. Includes us offsetting some of the unallowable charges with overdrafts.

   **Staff Changes:**
   - Number of new staff starting January 8, 2018:
     - 6 accountants, 3 interns.

6. **Closing and Future Meetings** *(Daryl Weinert)*

   - RAAC CAL will be on holiday break and the next meeting is February 2018 at Lane Hall. Metrics will be presenting.

   Daryl thanked everyone for their efforts in 2017. U-M had a record year in research - $1.5B!

   Meeting adjourned 4:22 p.m.

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**RAAC Committee-At-Large Meeting Dates**
- *No December meeting*
- *No January meeting*
- Tuesday, February 20, 2018, 3:00 - 4:30 pm *(Chris Allan, RAAC Metrics Subcommittee) @ Lane Hall (IRWG)*

**Executive Committee Meetings**
*Wolverine Tower, Conference Room 1025 (unless noted)*
- Tuesday, December 12, 2017, 3:30 - 5:00 pm
- Tuesday, January 9, 2018, 3:30 - 5:00 pm
- Tuesday, February 13, 2018, 3:30 - 5:00 pm
Research Administration Advisory Council
Communications Subcommittee

Update to RAAC Committee-at-Large
November 28, 2017

Communication Subcommittee Charge

The RAAC Communications Subcommittee seeks to:

- **Identify and assess the communication methods** currently used at U-M for research administration
- Once identified, **work to develop improved systems** that support robust, consistent and effective communications within the research administration community
- **Recommend best practices** by topic, purpose, and/or method
- **Facilitate and foster communications to and among research administrators by conducting the quarterly** Research Administrators Network (RAN) meetings
Communication Subcommittee Members

- Jeff Alber, ORSP (joined 6/2017)
- Kellie Buss, ORSP (joined 6/2017)
- Constance Colthorp, ORSP and Sponsored Programs
- Lori Deromedi, UMOR Compliance
- Chris DeVries, ORSP and Sponsored Programs
- Carrie Disney, School of Social Work
- Nicole Dyer, LSA
- Lisa Kisabeth, Engineering
- Cathy Liebowitz, ISR (joining 11/2017)
- Dean Michalak, Sponsored Programs (joined 6/2017)
- Becky O’Brien (Chair), School of Information
- Brenda Phillips, Medical School
- Pat Turnbull, Dearborn
- Tina Wells, ISR then UMTRI (joined 5/2017)

Accomplishments Since May 2017

- Onboarding new members
- RAN Meeting - May 17, 2017
- RAN Meeting - October 24, 2017
- Continued RAN Meeting Process Improvements
- Implement Post-RAN Survey
Research Administrators’ Network (RAN) Meetings - Wednesday, May 17, 2017

Topics:
- Small Company Innovation Program (SCIP)
- Professional Development Spotlight:
  - Navigate Training Program Update
  - UM Research Development Conference
- Followed by UMOR Staff Recognition Awards

Attendees: 122 in-person, 38 remote
Emcee: Daryl Weinert
YouTube: 55 subsequent views thus far

Agendas and presentations on the RAN webpage:
http://orsp.umich.edu/ran/

Research Administrators’ Network (RAN) Meetings - Tuesday, October 24, 2017

Topics:
- Subawards and Hybrid Purchase Orders
- Facilities & Administrative (F&A) Costs
- Professional Development Spotlight:
  - Professional Societies Updates
  - Navigate Training Program Update

Attendees: 121 in-person, 83 remote
Emcee: Debbie Talley
YouTube: 27 subsequent views thus far (w/o promotion)

Agendas and presentations on the RAN webpage:
http://orsp.umich.edu/ran/
Launched Post-RAN Meeting Survey after October 24th Meeting

- Initial Highlights
  - 44 responses to the survey
    - 43 attended
    - 1 did not attend
  - 21% response rate
  - Majority rated event “Very Good” or “Excellent”
RAN Meetings: The Numbers

In progress:

- Next RAN Meeting
  - Thursday, February 22, 2018
    [2:00 p.m. - 4:00 p.m.]

- RAN Attendee Tracking 2.0
- Review & Feedback of Web Pages
  - Cost Sharing - Updated ORSP webpage
- Online Community Forum / Informal Peer-to-Peer Sharing for RA Community
  - Actively in-progress
Informal Peer-to-Peer Sharing Forum

Fill the communication toolset gap for informal community sharing

Work Group Members:
- Constance Colthorp, Lori Deromedi, Chris DeVries, Becky O’Brien, Pat Turnbull

Current Status:
- Created group and testing functionality and processes
- Simulated adding users examining the invite experience from both sides
- Potential for use as chat function for RAN remote attendees.

Informal Peer-to-Peer Sharing Forum

Current Status (cont’d):

- Explored “invite” and “direct add” (identified fix for U-M ITS M-Google to resolve!)
- Looked at category capabilities (to categorize topics)
- Looked at sorting capabilities (to sort categories)
- Looked at browser compatibility for Chrome, IE, Safari, and Firefox
Informal Peer-to-Peer Sharing Forum

Next Steps:

- **We need 15 volunteers soon!** Work with RAAC volunteers and ITS for further testing: trial 11-15 names with new ITS script (to pass 10 name limitation).
- Additional testing with topics, categories, and organization.
- **We need 85 more volunteers in January!** Expand trial to 100 names (approx. 6-10 weeks) so pilot can take place for larger audience.
- Finalize with a list of about 900-3000* names

*This will not result in 3000 people getting unwanted emails. Allows them to see the group if they choose.

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Review of ORSP Webpages

- Current & Pending Support for RAAC Metrics
- Dashboard for RAAC Metrics
- Possible portal for Project Review groups (requested at Faculty Orientation and by Maureen Martin, separately)
Review of ORSP Webpages

Cost Share Webpage:

- Initial work by task group:
  - Members: Constance Colthorp, Chris Devries, Carrie Disney, Lisa Kisabeth, Brenda Phillips, Pat Turnbull, Corey Turner, Sharyn Sivyer (prior to retirement), Kathy Dewitt, and Leslie Chavez
- Reviewed and completed initial update of Cost Share webpages (ORSP & UMOR)
- Slight change in plans
  - Award System necessitated related work from a separate group to review and separate out different types of commitments
- Website updates to match eRPM changes

Next Steps:

- FAQs
- Resources

Guide for webpage review process

- Enabling distribution of process to task groups
Communications Subcommittee

Ongoing Work

- Plan and execute engaging and relevant RAN meetings (ran-plans@umich.edu)
- Solicit and provide input to guide the continued development of the new Research Enterprise website
- Recommend content and propose ideas for RAP newsletter

Questions?
ITS Update
RAAC Committee-at-Large

Cathy Handyside, ITS Research Administration Systems
November 28, 2017

Topics

SF424 (Grants.gov) Update - 12/2/17
- Support for NIH FORMS E

eRPM System Update – 12/11/17
- Update instructions for Grants.gov submissions not supported in eRPM
  - Transition from Adobe Forms to Workspace
- Update external IRB and Clinical Trial questions and help language
SF424 Grants.gov Update

- eRPM SF424 update scheduled for 12/2/18
- What’s Included:
  - More forms transitioned to new web-based format
  - Enhanced Subaward Import Functionality
    - No version limitation on the subaward for what can be imported. The subaward form can be an older version (e.g., fill out a R&R Subaward Budget V1.3 and import it into the R&R Subaward Budget V1.4)
    - Known issue with Subaward Form V1.4 that requires you to delete extra rows prior to import

SF424 Grants.gov Update (Continued)

- R&R Other Project Information Form
  - Good news - Corrected the missing attachments on the generated PDF.
  - Bad news - cannot order the Other Attachments
- Change to Information Copied from PAF to Grants.gov Forms
  - We are no longer able to copy the Human Subjects Pending indicator or the HUM Expiration Date from the PAF into the Grants.gov forms due to the new form format.
  - The data will need to be typed in manually.
Updated forms included in this release

- PHS 398 Career Development Award Supplemental Form V4.0 (HHS)
- PHS 398 Cover Page Supplement V4.0 (HHS)
- PHS 398 Research Plan V4.0 (HHS)
- PHS 398 Research Training Program Plan V4.0 (HHS)
- PHS Assignment Request Form V2.0 (HHS)
- PHS Fellowship Supplemental Form V4.0 (HHS)
- Research & Related Other Project Information V1.4 (Grants.gov)
- NSF Cover Page V1.8 (NSF)
- NSF Senior Key Person Profile (Expanded) V1.1 (NSF)
- NEH Matching Request Form V1.0 (National Endowment for the Humanities forms)
- ANEW Program Specific Data Form V1.0 (HHS)
- ED-900 General Application for EDA Programs V1.0 (Department of Commerce)

New form -

- PHS Human Subjects and Clinical Trials Information V1.0 (HHS)