Research Administrators’ Network (RAN)
Meeting Agenda October 7, 2015
2:00-4:00 pm
Michigan League Ballroom

Welcome & Introductions [2:00-2:05]
Pat Turnbull, RAAC Communications Subcommittee Chair

Heather Offhaus, Director, Grant Review & Analysis, Medical School
Serving as your emcee today!
http://univofmichigan.adobeconnect.com/p2e6lfcc2g6z/ 00:05:42

Updates [2:05-2:45]
10 min Sponsored Programs, Debbie Talley
10 min Office of Research & Sponsored Projects (ORSP), Craig Reynolds
10 min Research Administrators Schools & Colleges (RASC), Carole Bach
10 min Information Technology Services (ITS), Cathy Handyside
http://univofmichigan.adobeconnect.com/p739k78bc68/ 00:30:56

Featured Presentations [2:45-3:30]
Update on RAMP↑ (Mindy Larocca) [2:45-2:50]
http://univofmichigan.adobeconnect.com/p2otf8hkp4s/ 00:21:27

Break [3:10 - 3:20]
Update on RA Roles & Responsibilities Matrix (Heather Offhaus) [3:20-3:30]
http://univofmichigan.adobeconnect.com/p9ky2so6c4o/ 00:08:51

Professional Development Spotlight Panel Activity [3:30-3:55]
Presentations from Research Administration professional organizations:

National Council of University Research Administrators (NCURA), Sue Kelch
Society of Research Administrators (SRA), Cathy Soay-Ostrowski
National Organization of Research Development Professionals (NORDP), Jill Jividen/Maureen Burns
Society of Clinical Research Associates (SOCRA), Nabeela Iqbal

Questions from the audience

Closing remarks [3:55-4:00]
http://univofmichigan.adobeconnect.com/p6o0u9uoi7y/ 00:25:59
Welcome!
Research Administrators’ Network
October 7, 2015
Agenda

Updates [2:05-2:45]
- 10 min Sponsored Programs Office (Debbie Talley)
- 10 min Office of Research & Sponsored Projects (ORSP) (Craig Reynolds)
- 10 min Research Administrators Schools & Colleges (RASC) (Carole Bach)
- 10 min Information Technology Services (ITS) (Cathy Handyside)

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- National Organization of Research Development Professionals, Jill Jividen/Maureen Burns
- Society of Clinical Research Associates (SOCRA), Nabeela Iqbal

Closing remarks [3:55-4:00]
Happy Research Administrator Day!
September 25th

• Do you exercise your creative flair by color-coding multi-project application budget spreadsheets?

• Have you ever laughed with your colleagues about proposed direct costs?

• Is June 5th easier to remember than your anniversary?

With thanks to the NIH’s creative communication department!
Happy Research Administrator Day!
September 25th

• Have you ever been shopping and asked yourself “Is this purchase reasonable, allocable, allowable and necessary?”

• Have you contributed to improving the nation’s knowledge without ever working in a lab?

With thanks to the NIH’s creative communication department!
Sponsored Programs Update

Debbie Talley
Director of Sponsored Programs
Research Administrators’ Network
October 7, 2015
Transition to NIH subaccounts

• NIH transitioning awards to Payment Management System subaccounts

• Affects 243 parent projects at U-M

• Awards will be transitioned to new parent P/Gs as each receives budget year funding (November 2015 - September 2016)

• Sponsored Programs will contact Research Administrator 6 weeks prior to date of award transition (beginning of next budget period).
Uniform Guidance update

• Implementation of Uniform Guidance for Procurement – delayed until 7/1/17
Audits update

• A-133 audit – field work complete
• NSF audit
  – Most of first 250 transactions addressed
  – Site visit week of September 28th
  – Next steps
Receiving and depositing checks

• Follow U-M guidance
  – Identify and deposit checks timely
  – Do not mail checks

• SPGs
  – 519.03 Cash management general policies
  – 501.05 General accounts receivable

• Internal controls around receiving funds
  – TME101 Depository training course
  – TME103 Cash handling course

• More information
  – http://ssc.umich.edu/faq
  – Treasury@umich.edu
Office of Research and Sponsored Projects Update

Craig Reynolds
Director of the Office of Research and Sponsored Projects
Research Administrators Network
October 7, 2015
Update

• U.G. (2 CFR 200) Procurement Standards
  ✓ Delayed until July 1, 2017

• New Money? New PAF! New SOP!
  ✓ http://orsp.umich.edu/sites/default/files/500.04_postaward_processing_additional_funds.pdf

• New gift v. sponsored project guidance
  ✓ http://orsp.umich.edu/what-sponsored-project

• Direct charging space
  ✓ http://orsp.umich.edu/full-recovery-indirect-costs
• Timing of PAN/PAC Release
• NSF Proposal Checklist Online
• Limit on ONR No-Cost Time Extensions
  ✓ 90 day automatic; additional 12 MO with approval
• Reminders & Requests
  ✓ Closing Authorization Form
  ✓ Request ORSP Action
  ✓ Uploading final/submitted documents → PDF unless a contract to be negotiated
SPACE on THE PAF
The CHANGE..

Carole Bach,
RASC Chair
ISR Director for Research Administration
Why this Change?

• RASC (Research Administration Schools/Colleges,) in looking for ways to reduce some administrative burden, proposed to make an additional option when entering space of the PAF
• It has been determined that the space listed on the PAF is not being used by any central units and the data is only being by some units
• Adding an option creates an opportunity to streamline the gathering and entering of the information, yet retains the current functionality for those that want it
• It will still add multiple spaces for one person, if needed
What is Changing

• You can continue using the current options:
  o Check off “No individual space required”
  o Look up the exact room number and building and add it to the PAF
  o Add new space

• Additional option available to choose once the change is made to eResearch
  • Check off “adequate space committed, no additional space identified” and add the department id.
  • Please consult your school/college/institute about what their preferred option is
Things to Consider

• Keep in mind that different units have different business processes, so when collaborating across units, you need to communicate with other units to find out what their space requirements are, as you should do with any other necessary items when building a proposal across units.

• Units have the right to change the space information for their people.

• We are hoping for this change to go in the update for the end of October, so make sure and check the “What’s new” eRPM update at the end of the month to find out if this functionality made it, otherwise it will come out in December.
We will post the Mock-Ups of the changes and any job aids created on our site, when we have them.

Other highlights of the site: transfer grant best practices & proposal routing checklist
Research Administration Mentoring Program (RAMP↑) Update

Mindy LaRocca
Department Administrator
Nutritional Sciences
Research Administrators Network
October 7th, 2015
RAMP↑ Update

• Pilot Cohort
  – Completed July 2015 with very positive and constructive feedback
  – Held end-of-cycle celebration on July 27, 2015
  – Used feedback to make small changes
    – More guidance on meeting topics and getting started
    – Matching Mentors and Mentees with similar job duties and locations.
RAMP Update

• Fall 2015 – 2nd Cohort
  – Advisory council met and made matches on August 6th, 2015
  – Nine matched pairs this cycle (20 pairs in pilot)
  – Orientation held on September 29, 2015
  – Fall 2015 cohort to kick off this month
  – Members of the Fall 2015 cohort are here today
Positive Feedback

- "...excellent way to become connected with research community on a personal level"
- "...good program to pass on practical experience and knowledge to junior Research Administrators."
- "...already recommended RAMP to colleagues within Department."
- "This program was without a doubt, the best I’ve seen for professional development..."
## Fall 2015 Cohort Matched Pairs

<table>
<thead>
<tr>
<th>Mentor - Rick Krause</th>
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<td>Mentee - Anna Maria Caruso</td>
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<th>Mentor - Mary Freer</th>
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<td>Mentee - Cynthia Gallaway</td>
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<th>Mentor - Grace Sinay</th>
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<td>Mentee - Krista Golden</td>
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<th>Mentor - Chris DeVries</th>
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<td>Mentee - Jennifer Hoy</td>
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<th>Mentor - Marie Eddy</th>
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<td>Mentee - Joshua Manley</td>
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<th>Mentor - Sally Sivrais</th>
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<td>Mentee - Kaitlyn Marshall</td>
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<th>Mentor - Ruth Halsey</th>
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<td>Mentee - Andrea Mucci</td>
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<th>Mentor - Michelle Beaudry</th>
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<td>Mentee - Kristin Parrish</td>
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<th>Mentor - Terri Maxwell</th>
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<td>Mentee - Deborah Stark-Knight</td>
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Training Update

Amanda Coulter
Training Manager
ORSP and Sponsored Programs
Research Administrators’ Network Meeting
October 7th, 2015
What Did We Do? Where Are We Now?

Project Phases
1. ANALYZE (completed early 2015)
2. DESIGN (completed August)
3. DEVELOP - in progress
4. IMPLEMENT - October 29th
5. EVALUATE - Spring 2016
### Upcoming Project Timeline

#### Key *Upcoming* Dates:

- **10/8/15**: Train-the-Trainer begins
- **10/22/15**: Demonstration Practice Sessions
- **10/29/15**: First Module Class

#### Fall 2015 Sessions
Palmer Commons, 8:30 a.m. to 4:30 p.m.
- Thursday, October 29
- Thursday, November 5
- Thursday, November 12
- Thursday, December 3

#### Winter 2016 Sessions
Wolverine Tower, 8:30 a.m. to 4:30 p.m.
- Thursday, February 4
- Thursday, February 11
- Thursday, February 25
- Thursday, March 10
We engaged LPD to assist us with:

- refining learning objectives
- course design
- meeting outcomes
- training trainers
- creating evaluation processes
“Navigate” and “Fundamentals” Identities

- Consistent with the Research Enterprise website and graphic
- Professionally-designed logos
- Program “identity” with fonts, colors, graphics
Communications

- New “Navigate” landing portal, including RAMP and RAN information
- “Fundamentals” home page with FAQs
- Record Article
- RAPid
### Advisory Group

<table>
<thead>
<tr>
<th>Members</th>
<th>School/College/Unit</th>
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<tbody>
<tr>
<td>Amanda Coulter</td>
<td>ORSP and Sp. Programs</td>
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<tr>
<td>Cathy Handyside</td>
<td>ITS</td>
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<tr>
<td>Michelle Beaudry</td>
<td>EECS - Computer Science &amp; Eng.</td>
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<tr>
<td>Craig Reynolds</td>
<td>ORSP</td>
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<tr>
<td>Melinda LaRocca (Lead)</td>
<td>U-M School of Public Health</td>
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<tr>
<td>Heather Offhaus</td>
<td>Med School Grant Review &amp; Analysis</td>
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<tr>
<td>Rebecca O’Brien</td>
<td>School of Information</td>
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### Design Team Module 1: Overview

<table>
<thead>
<tr>
<th>Design Team Members</th>
<th>School/College/Unit</th>
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<tbody>
<tr>
<td>Amanda Coulter (Lead)</td>
<td>ORSP and Sp. Programs</td>
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<td>Cathy Handyside</td>
<td>ITS</td>
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<td>Corey Turner</td>
<td>School of Information</td>
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<tr>
<td>Kathy Devereux</td>
<td>Cent. Hum. Grow &amp; Develop</td>
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<tr>
<td>Lori Deromedi</td>
<td>UMOR</td>
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<tr>
<td>Peggy Westrick</td>
<td>LSA</td>
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<tr>
<td>Ron Sober (Curriculum Design Lead)</td>
<td>LPD</td>
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<tr>
<td>Ruth Halsey</td>
<td>UMTRI</td>
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<tr>
<td>Sue Kelch</td>
<td>Kresge, Med. School</td>
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<tr>
<td>Tom Zdebó</td>
<td>ORSP and Sp. Programs</td>
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Course Outline --- Fall 2015 (Part 1)

Overview
- U-M Research Enterprise
- Introduction to the Sponsored Projects Lifecycle
- Unit Roles and Organizational Responsibilities
- Applying the Lifecycle

Develop a Proposal
- The Art of Grantsmanship
- Introduction to Proposals and Lifecycle Tasks
- Sponsor Proposal Guidelines
- Common Proposal Sections
- Common Budget Components
- “Costs” of all Kinds
- Effort
- Budget Exercises
- Budget Periods v.s. Project Periods
- Drafting the Budget Justification
- Cost-Sharing and Other Leveraging
- Subcontracts
- Frequently Required Proposal Data
- Proposals without Sponsor Guidelines
- Strategies for Successful Proposal Submissions
- Less Common Proposal Sections

Route & Submit Proposal
- The Proposal v.s. the PAF
- Orientation to the PAF Sections
- Roles and Responsibilities in Routing & Approving
- Orientation to the eRPM Sandbox

Ethics & Compliance
- Overview of Research Ethics & Compliance
- Animal Use & Care
- Human Subjects
- Pluripotent Stem Cells (Human)
- Research Safety
- Research Integrity
- Conflict of Interest
- Controlled Substances
- Export Controls
Selected Cohort Participants will represent:

- College of Engineering
- College of Literature, Science & the Arts
- Life Sciences Institute
- Medical School
- Office of Research and Sponsored Projects
- School of Education
- School of Information
- School of Nursing
- School of Public Health
- School of Dentistry
- Sponsored Programs
- Taubman Architecture and Urban Planning
- Transportation Research Institute
Next Steps for 2016 and Beyond

- Deliver Fundamentals Part 1 (Fall 2015)
- Design Fundamentals Part 2 (Fall 2015)
- Deliver Fundamentals Part 3 (Winter 2016)

Prepared an Operating Budget Request for 2016/17

- Design Specialized Tracks?
- Assess Interest in Faculty Training?
Questions?

Amanda Coulter

acoulter@umich.edu

734-936-1281
Networking Break
Roles & Responsibilities Matrices

• RAAC Process surveyed Units – a priority to develop

• Organized like the lifecycle, outline keys roles and responsibility centers

• Build in a way to account for all campus
Roles & Responsibilities Matrices

http://orsp.umich.edu/roles-and-responsibilities
What is RASCI?

Responsible
Accountable
Support
Consult
Informed

Welcome again to RACI 101

https://www.youtube.com/watch?v=1U2gngDxFkc
# Roles & Responsibilities Matrices

## Proposal Development and Budgeting

<table>
<thead>
<tr>
<th>General</th>
<th>PI</th>
<th>UNIT ADMIN</th>
<th>ORSP</th>
<th>FSP</th>
<th>OTHER</th>
<th>RASCI COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and communicate required training courses for PI to be eligible to receive funding</td>
<td>I</td>
<td>I</td>
<td>I</td>
<td></td>
<td>UMOR / A and R</td>
<td>Foundation Relations and Library are possible resource providers</td>
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<tr>
<td>Provide centralized funding opportunity resources to the campus community</td>
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<td>I</td>
<td>S</td>
<td></td>
<td>UMOR / A and R</td>
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<tr>
<td>Maintain database of proposal submissions and awards</td>
<td>I</td>
<td>S</td>
<td>A/R</td>
<td>I</td>
<td>UMOR /S FR and BEC / C OTT / C</td>
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<tr>
<td>Act as institutional authority as to acceptability of sponsor requirements</td>
<td>S/C</td>
<td>S/C</td>
<td>A/R</td>
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## Proposal Development

<table>
<thead>
<tr>
<th>Prepare proposal that meets requirements outlined in the application instructions, including applicable rules and regulations.</th>
<th>A/R</th>
<th>R</th>
<th>S/C</th>
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</thead>
<tbody>
<tr>
<td>Prepare scholarly proposal</td>
<td>A/R</td>
<td>S</td>
<td></td>
</tr>
<tr>
<td>Request on-or-off-campus space needed in addition to that already assigned to the PI</td>
<td>A/R</td>
<td>S/C</td>
<td></td>
</tr>
<tr>
<td>Request modifications or renovations to on-campus or off-campus space if necessary</td>
<td>A/R</td>
<td>S/C</td>
<td></td>
</tr>
<tr>
<td>Prepare Proposal Approval Form (PAF)</td>
<td>A</td>
<td>R</td>
<td>C</td>
</tr>
</tbody>
</table>
What should I do?

• Be familiar with the project / format / information

• Ask questions within your unit

• Look ahead to other parts of the project

• Send feedback
  – Craig Reynolds creyno@umich.edu
  – Bryan VanSickle bvsickle@umich.edu
  – Heather Offhaus hmills@umich.edu
National Council of University Research Administrators  
– est. 1959

NCURA defines and serves Research Administration

NCURA is for you
• if you seek educational and volunteer opportunities
• if you would like to advance the field of research administration
  – Sue Kelch suekelch@med.umich.edu
  – Heather Offhaus hmills@med.umich.edu
  – Craig Reynolds creyno@umich.edu

Research Administrators’ Network: Professional Development Spotlight
Key Offerings for 4700 Members and Others:

- International, national, regional (section), and local (chapter) meetings;
- Online Education, including scheduled and on-demand webinars
- Traveling Programs: from Fundamentals, a Research Management Intensive, to an Executive Leadership Institute;
- Twelve RA certificate offerings in 12-thrust areas serving hospitals, universities, non-profits and industry;
- Continuing Education Units (CEUs) and Certified Research Administrator (CRA) credits; published Code of Ethics in Research.
- Online Career Center with postings reaching 15,000 candidates;

What Makes SRAI Special:

- Meeting locales vary!
- First-step pipeline with chapters, sections
- Global to local breadth
- Chapter Meeting under construction

VISIT: www.srainternational.org
Maureen Burns & Jill Jividen

VISION: A robust, national peer network of Research Development professionals that enhances competitive multi-, inter- and transdisciplinary research.

• Est. 2010, now 500 members strong (8 from U-M)
• U-M Research Development group
  – Meet to discuss initiatives, strategies, best practices, resource sharing and successes
  – jjgoff@umich.edu or 4-3634
Society of Clinical Research Associates

To promote quality clinical research
to protect the welfare of research participants and
to improve global health

http://www.socra.org/

Quality Education × Peer Recognition × Professional Certification

Nabeela Iqbal, MBBS CCRP

Email Nabeela@med.umich.edu
Phone 734-232-0759
Professional Development Opportunities

Questions?

NCURA
supporting research...together™

Society of Research Administrators International

SOCRA
FOR CLINICAL RESEARCH EXCELLENCE

NORDP
National Organization of Research Development Professionals
Closing Remarks

Thank you for attending or remotely viewing!

Video and slides will be posted to the website next week

Please send ideas/feedback to ran-plans@umich.edu