1. **Introductions of Members and Guests** *(Debbie Talley)*

Debbie called the meeting to order at 3:00 p.m. and introduced Judy Carrillo who is providing the RAAC Training Subcommittee update.

2. **Presentation**: RAAC Training Subcommittee Update *(Judy Carrillo)*  
   *Attachment #1*

**Membership:**

There are two new members:
- Jeanne Haney from Sponsored Programs joined, after Amanda Simon rotated off.
- Nick Prieur from ISR joined.
- Cathy Handyside has stepped down.

**Navigate Recognition:**

- Judy thanked everyone for the commitment to the Navigate training initiatives.
  - 100 volunteer contributors/trainers.
  - 19 instructor led sessions.
  - 1200 participants.
  - 9 e-Learning modules developed.

**Current Navigate Offerings:**

- Fundamentals is in progress and will end on November 19.
- Uniform Guidance – registration is open until October 25th. Course starts November 7 and there are a few openings left.
- Budgeting Basics and Advanced Budgeting: Task-Based/Hourly Budgets courses were recently completed.
- Advanced Budgeting: Internal Proposals has started and will be complete on November 14.
- Lunch & Learn Series:
  - Introduced two new Sponsor sessions; one for NSF and one for NIH.
The NSF session was held last week (October 14) and Becky O’Brien (School of Information) and Kellie Buss (ORSP) presented.

NIH is coming up on October 30. Stacy Althouse (Medical School) and Daniella Marchelletta (ORSP) will be the presenters.

- Two new sessions are upcoming:
  - Webinar with Property Control in the Winter.
  - Shared Services in the Spring.

Navigate Website:
- The Navigate website has a new format. We’ve moved to a module/card look, rather than the long list that required a lot of scrolling.
  - Judy thanked Constance Colthorp for spearheading the new website, and Cindy Dames and Dave Nassar for their contributions, along with the Navigate team.

RAMP Mentorship Program:
- Completed the 5th cohort in July 2019 with 16 mentor-mentee pairings.
- The 6th cohort started this month with 15 mentor-mentee pairings and will run until July 2020.

eLearning:
- Two new eLearning modules rolled out in late August:
  - Award Modification
  - Cost Transfer
- Up next: Stewardship. Once this module is released, all of the identified e-Learning modules based on the Fundamentals content will be complete.
- 400 participants have enrolled in an eLearning module.

Work in Progress:
- A list of useful reports is coming soon. We are working with Chris Allan and the Metrics Subcommittee developing a list of useful Business Objects reports for RAs. Will work with RAAC Metrics on where the reports will be housed, and then released.

RA Competency Roadmap:
The goal is to help identify training gaps and provide research administrators (RAs) and supervisors with a tool that outlines knowledge, skills, and abilities needed to perform their job.

- We have finalized the content, but it is overwhelming and the spreadsheet is difficult to view either online or in paper format.
- David Mulder submitted a proposal to the School of Information to be chosen for one of their student projects and was selected. A team of students has been established that will produce a recommendation related to a delivery method for the content.
  - The roadmap is based on the Project Lifecycle phases – with overview, competencies, tasks within competencies, then resources, both internal and external.
  - The roadmap will help RAs (and supervisors) to see possible career progression options.

Faculty Resources Website:
The goal for this project was to create a robust research administration training and information resource for faculty.

- Under development for content. Working with Boxcar (web developer) and hoping to go live early 2020 (depending on the feedback received).
- Looking for faculty (preferably new) to test the site, and will only take 30 minutes of their time. If you have a faculty member in mind, please let Judy Carrillo or David Mulder know.
Note: the Navigate team will meet the faculty volunteers in a location that is convenient for them.

- Judy gave a demo of the website and how it works. It is based on levels: there is quick high-level information with the option to obtain more detail.

New Projects:
RA Complex Project Management (for Pre and Post-Award):
- Co-leads: Amy Brooks (CoE) and Patrick Lagua (Dental School). This has been a huge task and Judy thanked Amy and Patrick for their efforts.
- Topic areas:
  - Financials (internal controls; cost transfers-JEs; invoicing)
  - Human Resources (recharge rate; payroll; U Year; GSRA appointments)
  - Subs of all Kinds (how to manage subcontracts; pass thru invoicing; subprojects with U-M).
  - Pre-Award Management (contracts-small business; compliance).
- Delivery method could be a combination of an instructor-led class and a Lunch & Learn session. It depends on the content being developed now and how it looks when finished. We are looking at Spring 2020 to go live.

BusinessObjects for Research Administrators:
- This will be an instructor-led, full-day course for true BusinessObjects beginners.
- The pilot will be early December 2019.
- We will hold the training in the WoTo computer training room.
- Limited to 12 participants.
- Course content will include introductory information presented in the two IT4U webinars and Lunch & Learn sessions, and then move into more advanced topics, finishing with a series of hands-on query/report exercises.

What’s Next?
The Training Subcommittee will begin exploring ideas for new courses/training opportunities. If you have ideas, please send them to Judy or David Mulder.

Yvonne asked if there is a time frame for the release of the RA Competency Roadmap. David answered that there is no firm time frame yet. The School of Information student project will deliver a technical recommendation and then we will need to see what we can do based on budget, resources needed, etc. We discussed releasing a low-tech version but the spreadsheet is so large that it may not be very usable.

3. **ORSP Update (Yvonne Sturt)**

Yvonne Sturt gave the ORSP update.

**Staff:**
- ORSP welcomed five new Project Representatives (PRs) on October 7, 2019:
  - **Government Team:**
    - Christy Bohensky
    - Patrick Case
    - Becca Timmermans
  - **Private Sponsors Team:**
    - Arielle Javarinis
    - Manny Pierce
We are working on hiring a 6th PR for Data Use Agreements.
Will begin interviewing (internal promotions) for Assistant Managing PRs.
  ○ Adding a third Clinical Trials Assistant Managing PR.
  ○ Adding a second Government Sponsors Assistant Managing PR.
Posting for a new Associate Director position in ORSP in the next 2 weeks and shooting to have in place by January 2020. The posting will be up for one month.

Miscellaneous:
  ● NSF – Implementation date for Proposal Award Policies and Procedure Guide (PAPPG) has been delayed for support changes.
  ● NSF ScienCV – There will be a delay in the January 2020 requirement to use SciENcv for generating biosketches. It is still coming so good to start using. The tool generates biosketches for NSF.

Kathy asked about the new signature authority levels and whether ORSP has noticed an increase in volume as a result. Yvonne replied that she is not sure about volume, but ORSP is working on the business processes surrounding this.

4. ITS Update (Cathy Handyside)

  ● Working on updating eRPM to support the Deadline Policy coming January 6, 2020. Cathy and Craig presented on the policy at RAN and more materials will be available next month. Changes in eRPM include:
    ○ new states;
    ○ new workflow behavior; and,
    ○ a couple of new activities.

Cathy asked for any feedback on the Deadline Policy. While she is not able to comment on the policy itself, she can help with any workflow/process questions or feedback.

Judy mentioned that there is a concerted push within the Medical School and Internal Medicine to let faculty know that proposals need to be submitted in a timely manner. The Medical School has released a very nice dashboard that helps administrators understand the timeliness of their proposals currently. Judy added that the unit-level communication has been effective. Direct communication is critical because faculty do not read the messages from eRPM.

Mindy mentioned that it is nice to have a deadline policy that comes from the top down. This will help Public Health create and implement their own deadline policy. Danielle commented that faculty in LSI are aware of the policy but it will be interesting to see how this plays out once the policy is implemented.

Stephanie asked how to reconcile the implementation of the deadline policy with more staff being added in ORSP. Constance responded that only a small portion of a PR’s time is spent reviewing proposals. Yvonne added that even bringing on five new staff members still means we are understaffed based on the growth of the ORSP workload over the years. Additionally, there is a high level of burnout among the staff.

Danielle urged her colleagues to train the younger faculty as soon as they arrive. She conducts training with graduate students and postdoctoral fellows and stresses the importance of submitting proposals early. She has found that this cohort is usually much more compliant with any deadlines.
Kathy added that UMOR will be revisiting and further enforcing its deadlines relating to cost-share requests in order to comply with the ORSP deadline policy.

Constance reminded the group to reach out to her if there are unit needs relating to materials, presentations, or other items that may help with educating faculty and staff.

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

**Reports**
- We have now completed a little over 1,000 reports (not quite 50%) that are due by the end of the calendar year. Thanks to everyone for getting your reports to Sponsored Programs in a timely manner.

**Staff:**
- We have five new accountants who just finished formal training and received their first assigned reports. Doing a great job so far.

**Single Audit:**
- Research & Development was not included this year, but the University will still submit a single audit. Closing meeting in early December.
- Heather Sutphen presented on the new research administration classification titles at the October RAN meeting. Sponsored Programs will use the new titles effective January 1, 2020.
  - Debbie thought the new titles will be helpful for staff on determining promotions, etc. For example, taking a new job for the money, but not position, can be a detrimental choice.

6. **Closing and Future Meetings** *(Debbie Talley)*

  - Reminder that we are still seeking locations for the 2020 meetings!

  - Chris DeVries sent a request for meeting location suggestions. Let Chris know if you have a location to fit our meeting.
  - Tuesday, November 19th is the next meeting at North Quad.
  - No meetings in December and January.

Meeting adjourned at 3:45 p.m.

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**RAAC Committee-At-Large Meeting Dates**
- Tuesday, November 19, 2019, 3:00 – 4:30 pm @ North Quad *(Becky O’Brien, RAAC Communications Subcommittee)*
- No December meeting
- No January meeting
Research Administration Advisory Council

Committee-at-Large

Training Subcommittee Update

October 22, 2019

Judy Carrillo
Michigan Medicine

Current Subcommittee Membership

- Judy Carrillo, Chair, Michigan Medicine
- David Mulder, ORSP/Sponsored Programs
- Dave Nassar, ORSP/Sponsored Programs
- Chris DeVries, ORSP/Sponsored Programs
- Raquel de Paula Silvius, ORSP/Sponsored Programs
- Lyn Fyfe, ORSP/Sponsored Programs
- Kim Angelopoulos, LSA
- Amy Brooks, CoE
- Lori Deromedi, UMOR
- Emily Hamilton, CoE, UMTRI
- Haney, Jeanne, Sponsored Programs
- Lark Haunert, ORSP
- Sue Kelch, Michigan Medicine
- Patrick Laguna, Dental
- Terri Maxwell, ORSP
- Melinda LaRocca, Public Health
- Susan Powell, CoE
- Nick Prieur, ISR
- Cathy Seay-Ostrowski, Biomedical Eng
- Pat Turnbull, U-M Dearborn
Agenda:

- Update: Navigate Training Opportunities
- Work in Progress

Navigate Recognition Luncheon July 2019

- Approximately 100 volunteer contributors/trainers
  - 19 instructor led sessions
  - 1200 participants
  - 9 e-Learning modules
All Training Opportunities available on Navigate Portal Website:

orsp.umich.edu/navigate

Also includes video recordings of Lunch and Learn

UPCOMING NAVIGATE OFFERINGS

- Fundamentals - In Progress
- Uniform Guidance - November 7 (registration closes 10/25)
- Budgeting Basics - Recently Completed
- Advanced Budgeting: DoD Budgets - To Be Announced
- Advanced Budgeting: Internal Proposals - 10/14 & 11/14; Registration now closed
- Advanced Budgeting: Task-Based/Hourly Budgets - Recently Completed
- Lunch and Learn - Sponsor Specific Sessions: NSF recently provided; up next NIH 10/22 (WT, Suite 18)

New look to website!
RAMP↑ Mentoring Program

- 5th cohort completed in July 2019 with 16 mentor-mentee pairs.
  - 15 matched pairs for the 6th cohort.
  - Orientation was held on October 17, 2019.
  - 6th cohort will run from October 2019 – July 2020.

eLearning

- Two new modules rolled out in late August
  - Award Modification & Cost Transfers
- Up next: Stewardship
- Once Stewardship is released, Fundamentals e-Learning modules will be complete
Useful Business Objects Reports

- Still coming soon; list of useful BO reports for RAs to be housed in one location

<table>
<thead>
<tr>
<th>Report</th>
<th>Report Details</th>
<th>Navigation</th>
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<tbody>
<tr>
<td>Project/Grant Report</td>
<td>• Shows how to find details about history and changes to your P/G made by</td>
<td>&gt;Main Menu</td>
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<td></td>
<td>Sponsored Programs</td>
<td>&gt;Set Up Financials/Supply Chain</td>
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<td></td>
<td>• Has the status of some of the reports submitted to the sponsor per the award</td>
<td>&gt;Common Definitions</td>
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<td>requirements</td>
<td>&gt;Design Chartfields</td>
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<td>• Tip: Save to your Favorites as you may use this one often</td>
<td>&gt;Define Values</td>
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<td>&gt;Chartfield Values</td>
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<td>&gt;Project/Grant</td>
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<tr>
<td>Parent Summary PBSR</td>
<td>• Useful because it pulls the parent project as a whole and also each</td>
<td>&gt;Main Menu</td>
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<td>individual Shortcode under that parent</td>
<td>&gt;Reporting Tools</td>
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<td></td>
<td>• This report is different than the PBSR report, which only pulls one project</td>
<td>&gt;Budget Reports</td>
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<td></td>
<td>at a time</td>
<td>&gt;Parent Summary Budget Status</td>
</tr>
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<td>• Can be long but has everything in one place vs. M-Reports where you can</td>
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<td>only look at each one individually</td>
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Research Administrator Competency Roadmap

To help Training Committee identify training gaps and provide research administrators and supervisors with tool that outlines knowledge, skills and abilities needed to perform job.

- Content has been finalized
- Navigate administrative team, under direction of David Mulder, working with School of Information students on delivery method
Faculty Resources - Website Update

- Create a robust research administration training and information resources for faculty
  - Team has implemented latest round of technical changes in conjunction with Boxcar Web Development Consultants, and content updates based on feedback from second session with expanded working group
  - Team has drafted usability test script for faculty volunteer sessions.
  - Current go-live estimated for early 2020, but highly dependent on amount and type of usability feedback.

Special thanks to our workgroup members:

- Lori Deromedi (UMOR) John Christiano (U-M Dearborn); Erin Kingsley (U-M Flint); Amanda Simon (Sponsored Programs), Lark Haunert (ORSP); Patrick Lagua (Dentistry); David Mulder (Sponsored Programs/ORSP)

Website Prototype for Senior Faculty Resource [click here]
New Training Opportunity Under Development - RA Complex Project Management (pre- and post-award)

**Co-Leads:** Amy Brooks, CoE; Patrick Laga, Dental

Topic areas include
- **Financials** (internal controls; cost transfers-JEs; invoicing)
- **Human Resources** (recharge rate; payroll; U Year; GSRA appointments)
- **Subs of all Kinds** (how to manage subcontracts; pass thru invoicing; subprojects with UM)
- **Pre-Award Management** (contracts-small business; compliance)

Committee Members: Becky Youmans (Michigan Medicine); Cathy Howell (SPH); Cathy Liebowitz (ISR); Dave DeWeerd (CoE); Edward Radwan (Michigan Medicine); Else Larsen (SEAS); Elizabeth Tropiano (Kinesiology); Nicole Dyer (LSA); Terri Maxwell (ORSP); Zonda Ketola (UMTRI); Jessica Mirelez (Michigan Medicine); Ben Rodriguez (CoE); Kristen Rea (LSA) Melissa Schorn (Michigan Medicine); Denise Bianchi (SPH); Aaron Campbell (Sponsored Programs)

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**Business Objects for Research Administrators**

- Full day course for true beginners
- Pilot, early December
  - Computer room at WT
  - Limited to 12 participants
  - Course content will include introductory information previously presented in 2 “IT4U” webinars and Lunch & Learn sessions, and then move into more advanced topics, finishing with a series of hands-on query/report exercises.
What’s Next?

- Please send us your ideas....

Questions?