Research Administrators' Network Meeting

AGENDA

May 17, 2023
2:00-3:30 p.m.
Zoom Webinar

Welcome & Introductions

Cathy Liebowitz, RAAC Communications Subcommittee
Jennifer Huntington, Guest Emcee

RAAC Metrics Resources for Research Administrators

Jennifer Huntington, ISR and Chair, RAAC Metrics

Updates

RAAC Update – Chris DeVries, RAAC Project Manager
Information and Technology Services - Carolyn Pappas, Program Manager, ITS
Sponsored Programs - Kristie Beckon, Reporting Asst. Director, Sponsored Programs
Office of Research & Sponsored Projects - Andrea Anderson, Assoc. Director, ORSP

Closing Remarks

RAN schedule for the rest of this Calendar Year:
http://orsp.umich.edu/ran

Ideas for a future meeting?
Contact ran-plans@umich.edu

Brought to you by the Research Administration Advisory Council (RAAC) Communications Subcommittee.

Welcome to RAN!

May 17, 2023
Research Administrators' Network (RAN) Meeting

Welcome!

RAAC Communications Subcommittee

- Christy Bohensky (ORSP)
- Jodi Caviani (Social Work)
- Kara Cristian (LSA)
- Constance Colthorp (ORSP/Spon Progs)
- Cindy Dames (ORSP)
- Lori Deromedi (UMOR)
- Kathy Devereux (UMOR)
- Chris DeVries (ORSP/Spon Progs)
- Prentiss Laich (Spon Progs)
- Melissa Li (Med School)
- Cathy Liebowitz (ISR)
- Amy Lingle (Engineering)
- Sarena Nuttall (Engineering)
- Becky O'Brien (UMSI)
- Thomas Paluchniak (ORSP)
- Ashley Tyler (Spon Progs/OCA)

Meeting Notes & Details

- This event is being recorded. The presentation and slides will be posted to the RAN webpage.
- Zoom webinar - watch mode. Chat is disabled.
- You can submit questions via the Q&A function.
- Live captioning is turned on (you can disable this using your settings).
- We acknowledge that the University of Michigan is located on the territory of the Anishinaabe people.

Our Agenda

What we have planned for you today

- **Presentations:**
  - RAAC Metrics
- **Updates:**
  - ORSP, Sponsored Programs, ITS

“The best investment is in the tools of one's own trade.”
– Benjamin Franklin

RA Community Kudos

Julie Olivero was installed as Chair of NCURA's Midwest Region

2023 OVPR Staff Recognition Awardees:

Research Administration Recognition Award -

- **Rebecca Youmans DeMoss**, research administration senior manager, Med School
- **Sheree M. Temple**, research administration senior manager, Pharmacy

OVPR Exceptional Staff Recognition Award

- **John Corthell**, industry relations manager, Innovation Partnerships, OVPR
- **Darlene Pennington-Johnson**, export controls officer and director of Export Controls Program, OVPR

Research Study Coordinator/Manager Staff Recognition Award

- Lauren M. Smith, research area specialist senior, SPH

Coming Soon

- **Virtual Networking Sessions**
  - Depending on your feedback (stay tuned!), we may have a follow-up session to this meeting with RAAC Metrics.
  - We also have a few other ideas for June, July, and August, as we celebrate **1 year of offering these sessions!**
- **More 21 Questions with RA community members**
- **October RAN**

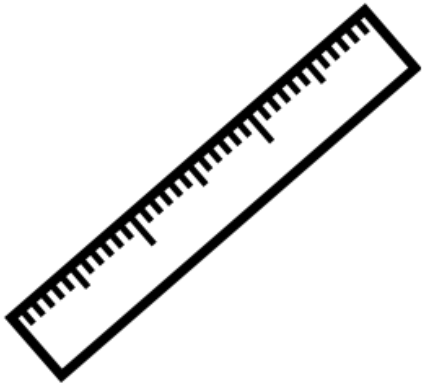
Our Emcee - Jennifer Huntington, B.S., CRA

- Research administration senior manager, ISR
- 16+ years in research administration
- RAAC Metrics Subcommittee Chair, and long-time member; RAAC DEI workgroup member
- Jennifer’s family recently expanded to include new puppy Xena

RAAC Metrics Resources for Research Administrators

May 17, 2023
RAN Meeting
Jennifer Huntington / Research Administration Senior Manager, ISR

RAAC Metrics Charge



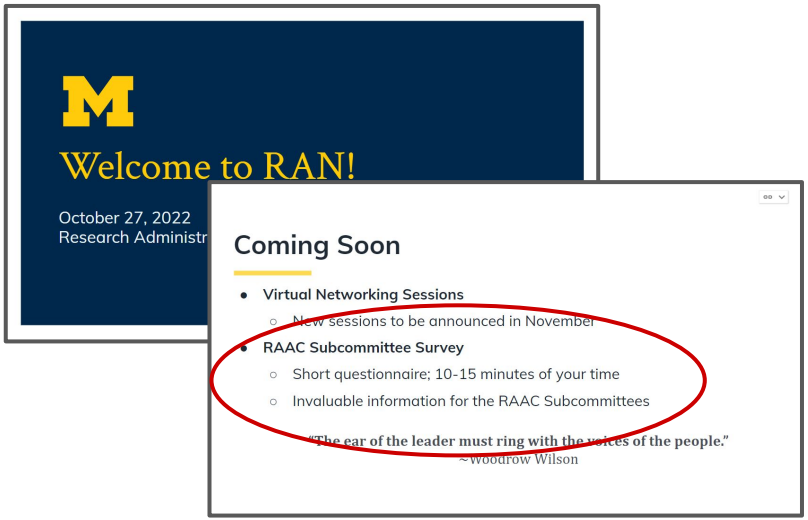
Assist those interested in research administration data by enabling them to acquire the information desired to meet their strategic and operational data needs. We do this by:

- Helping **locate** reporting resources;
- Working to **educate** about using the resources; and,
- Doing our best to **advocate** for availability and experience.

RAAC Metrics Membership

- Chris Allan (ISR)
- Steve Beach (LSA)
- John Cristiano (Dearborn)
- Chris DeVries (RAAC)
- Laura Dickey (ORSP)
- Stephanie Hensel (Marsal School)
- Jennifer Huntington, chair (ISR)
- Adam Mall (Sponsored Programs)
- Melissa Milligan (LSA)
- Vasu Ramani (ITS)
- Mike Randolph (ITS)
- Rachael Lee (Engineering)
- Susan Powell (Engineering)
- Susan Sica (Medical School)
- Polly Simms (ORSP)
- Beth Wenner (ORSP)

RAAC Survey



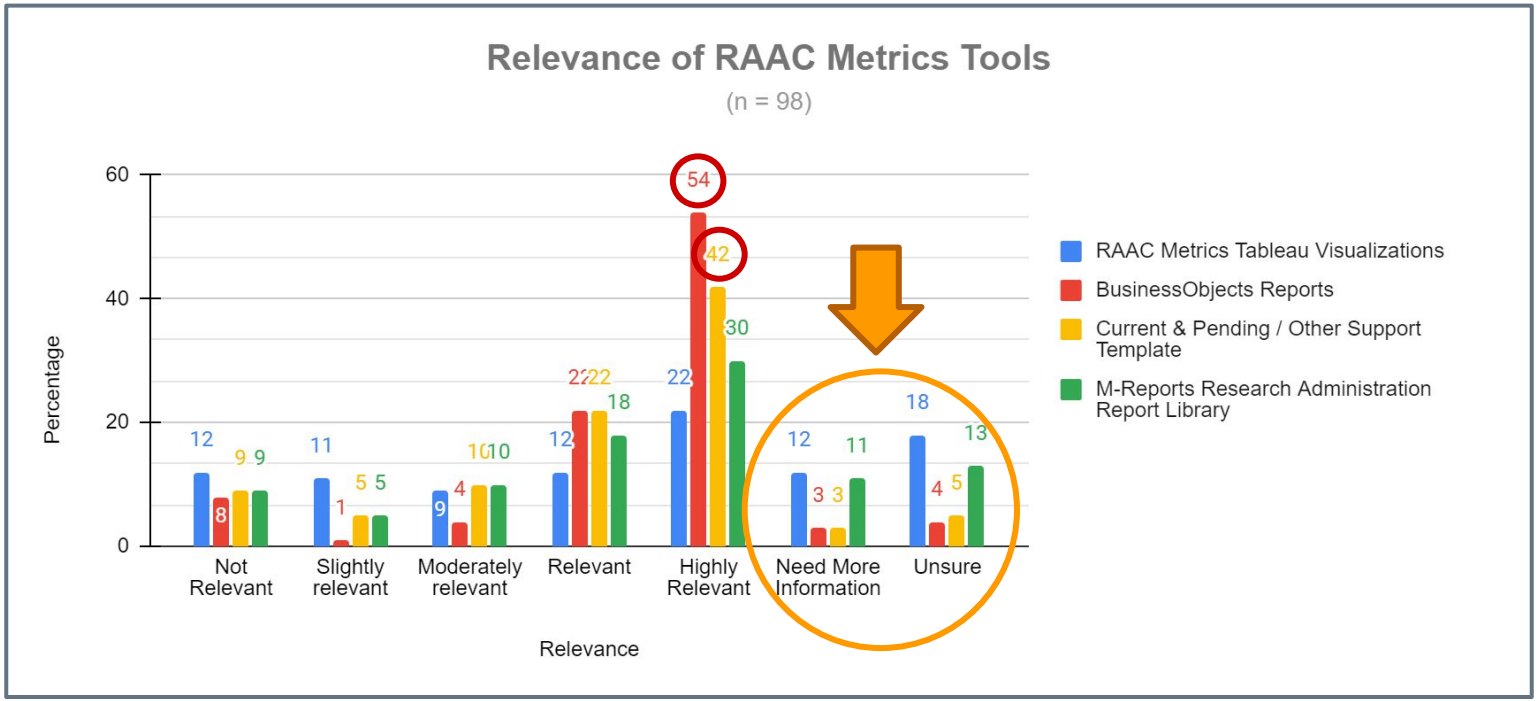
Screenshot of slides from October 2022 RAN meeting.

- We mentioned the survey in the October 2022 RAN Meeting.
- Survey was open for four weeks during November and December 2022.
- Thanks those who submitted one of the 98 responses!
- RAAC Metrics reviewed its results and we are here today to share more about our work.

RAAC Metrics Overview

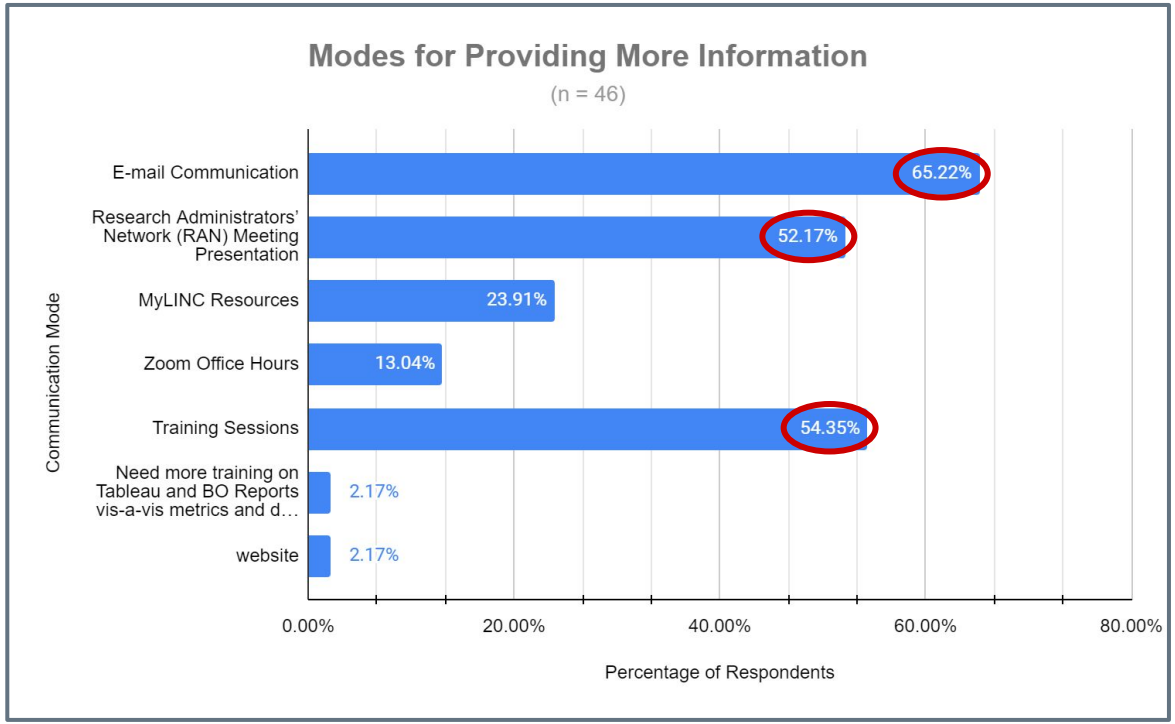
- BusinessObjects reports are highly relevant to respondents.
- The Current and Pending / Other Support report is relevant as well.
- There may be opportunities to partner more with RAAC Training and Communications.

RAAC Metrics Survey Results



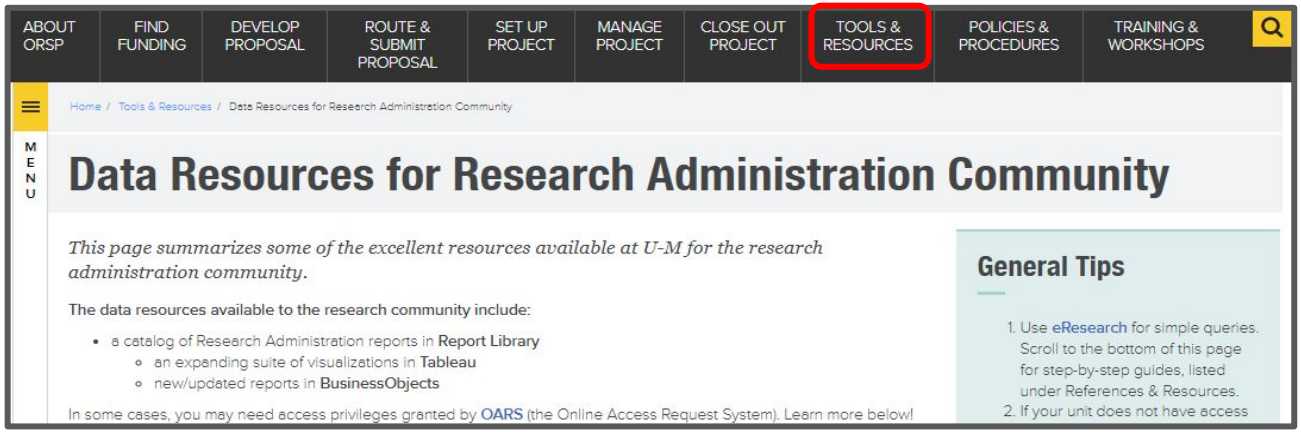
Question text: “Please indicate how relevant and applicable the following RAAC Metrics tools are to your role.”

RAAC Metrics Survey Results



Question text: "If you indicated that you "Need More Information" above, please let us know the mode(s) that would be helpful."

Resources



Go to https://orsp.umich.edu/metrics for this information.

General Tips

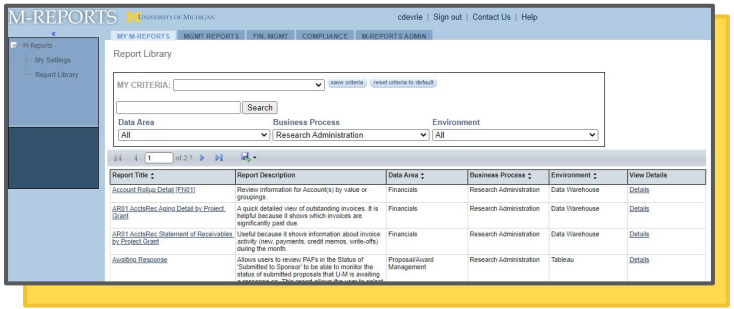
1. Use eResearch for simple queries. Scroll to the bottom of this page for step-by-step guides, listed under References & Resources.
2. If your unit does not have access to BusinessObjects and its U-M-Maintained/Research Reports, contact 4-HELP or email 4help@umich.edu with the Subject: "eRPM ORSP Tier 3" and the details of your request.

Training and Support for BusinessObjects

If you need training and support or an introduction to Business Objects, be sure to check out:

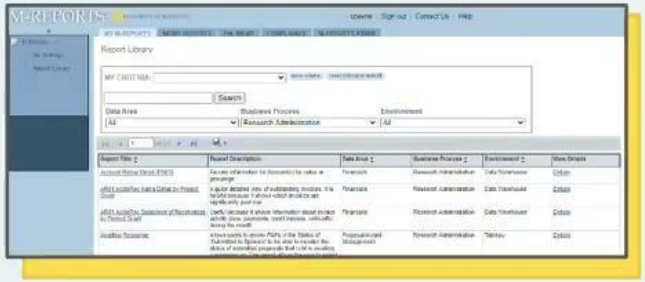
- Lunch and Learn session on Introduction to BusinessObjects and the eRPM Data Set.
- Additional Resources for accessing the IT4U87: The eResearch Proposal Management (eRPM) data set.

M-Reports Report Library

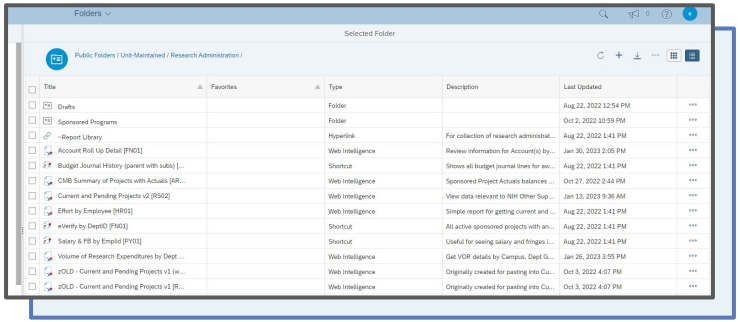


- **List of curated reports from multiple reporting tools** available to research administrators.
- **Useful for serving as a “one-stop shop” for accessing reports** relevant to your role.

M-Reports Report Library Demonstration

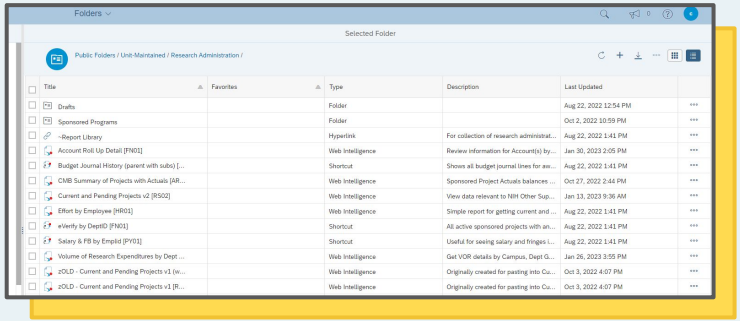


BusinessObjects Reports



- There are two collections of reports accessible in Business Objects:
  - **UM-Maintained/Research** (managed by ORSP)
  - **Unit-Maintained/Research Administration** (managed by RAAC Metrics)
- Contains reports on eResearch data, payroll, financial transactions and financial aid.

BusinessObjects Reports Demonstration



Resources – BusinessObjects

BusinessObjects 4.3 Training Opportunities

Webinars

A series of webinars was conducted to explain the upgraded system, including demonstrating the system's new look and feel, and introducing some new features. The demonstrations focused on the new UI, running reports, creating reports and exporting data.

Recordings of the webinars are available using the links below:

- Recording of the August 4 webinar (MiVideo)
- Recording of the September 15 webinar (MiVideo)
- Recording of the September 26 webinar (MiVideo)
- Recording of the October 5 webinar (MiVideo)
- Recording of the October 12 webinar (MiVideo)

Documentation Resources

- The BusinessObjects - Running Reports eLearning course was updated for BusinessObjects 4.3. The course covers running, exporting, organizing, scheduling, and formatting reports. Even if you have taken this course previously, it provides a good introduction to the upgraded environment.
- The BusinessObjects 4.3 User Resources website is your one-stop location for all BusinessObjects training materials.
- Overview of BusinessObjects 4.3 SP2 Changes includes feature mapping between old and new versions.

Need Help?

Contact the ITS Service Center

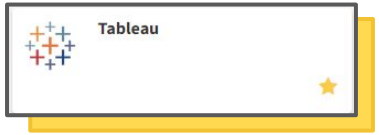
734-764-HELP (4357)

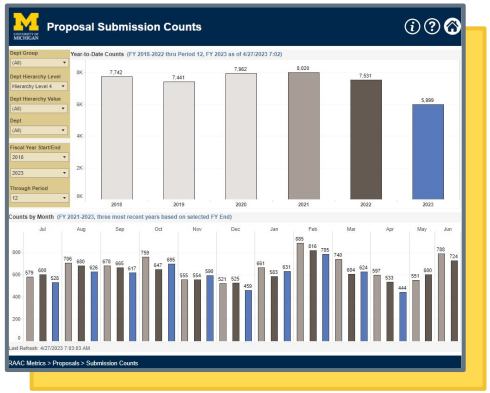
Contact the BusinessObjects Upgrade Project Team

BusinessObjectsUpgradeProject@umich.edu

See this link for more information – https://its.umich.edu/projects/businessobjects-upgrade/training

Tableau Visualizations





- The RAAC Metrics Tableau visualizations were first published with the intention to help units **explore trends in their research administration data**.
- Visualizations are a great way to summarize and present information to others, like leadership.

Tableau Visualizations Demonstration

Zoom Poll

After hearing more about these metrics and reporting resources, please **respond to a brief Zoom poll** so we may better address your needs.

Which of the following topics would you like more information about?
(select all that apply)

- BusinessObjects – running reports
- BusinessObjects – editing reports
- M-Reports – uses, tips & tricks
- Tableau – uses, tips & tricks

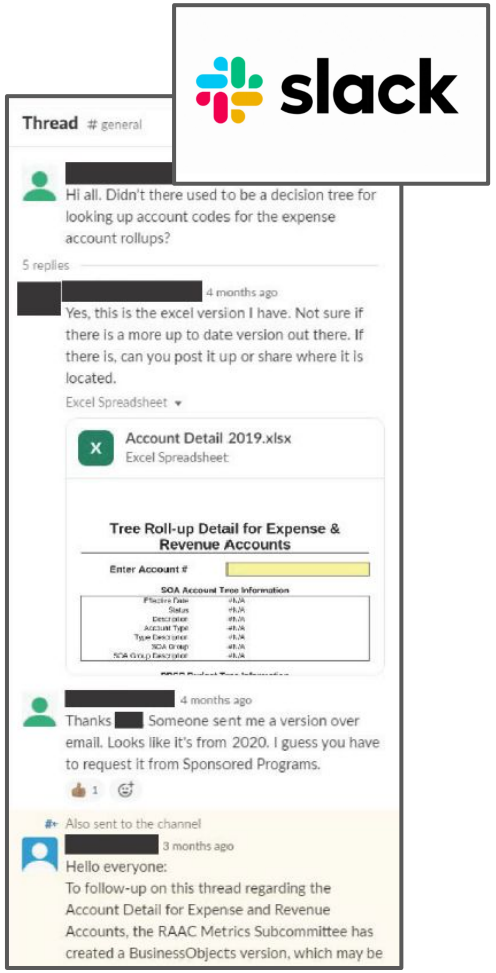
What modes of learning would be most helpful for you?
(select all that apply)

- Virtual Networking Session
- Navigate Course
- Demonstration Videos
- Step-by-step Document

Need More Information?

Email raac.metrics.support@umich.edu and we would be happy to point you in the right direction or bring suggestions to the subcommittee for discussion.

Post your question to the RA Forum on Slack. We have assisted with data needs on Slack and we hope to grow this as a forum to share data and reporting resources.

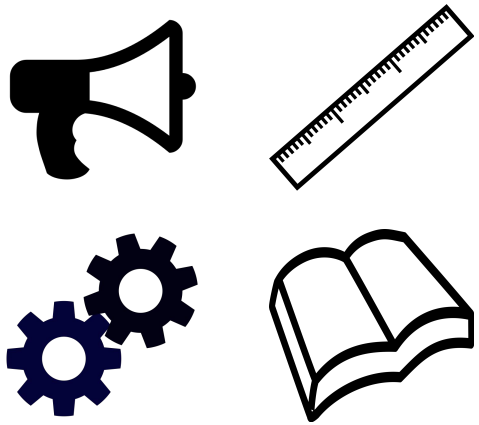


Thank you!

RAAC Update

May 17, 2023
RAN Meeting
Chris DeVries / RAAC Project Manager

RAAC Chairs Update



- Patrick Lagua will be stepping down from the RAAC Training Chair role as of July 1, 2023.
- We are conducting a broad search for a successor and are piloting a Co-Chair role.
- More information is forthcoming via email and posted on Slack.
- Send candidate names to Chris DeVries (cdevrie@umich.edu)

National Council of University Research Administrators (NCURA)

NCURA
Supporting Research...*together*™
National Council of University Research Administrators

NCURA National Meeting Bulk Discount

- We will be organizing an opportunity to take advantage of a bulk discount for the 2023 NCURA National Meeting (August 6-9).
- Discount levels:
  - Register **5 or more** and receive:
    - 10% off meeting registration;
    - $20 off one year of NCURA dues.
  - Register **10 or more** and receive:
    - 10% off meeting registration;
    - $40 off one year of NCURA dues.
- More information will be forthcoming.

April 2023 Virtual Networking

- We conducted a Virtual Networking Session focused on Graduate Student Research Assistants (GSRAs).
- U-M Human Resources (UHR) asked that we share their Graduate Student website, which has more information about GSRA appointments.

UHR Graduate Student website; full URL: https://hr.umich.edu/working-u-m/my-employment/academic-human-resources/graduate-student

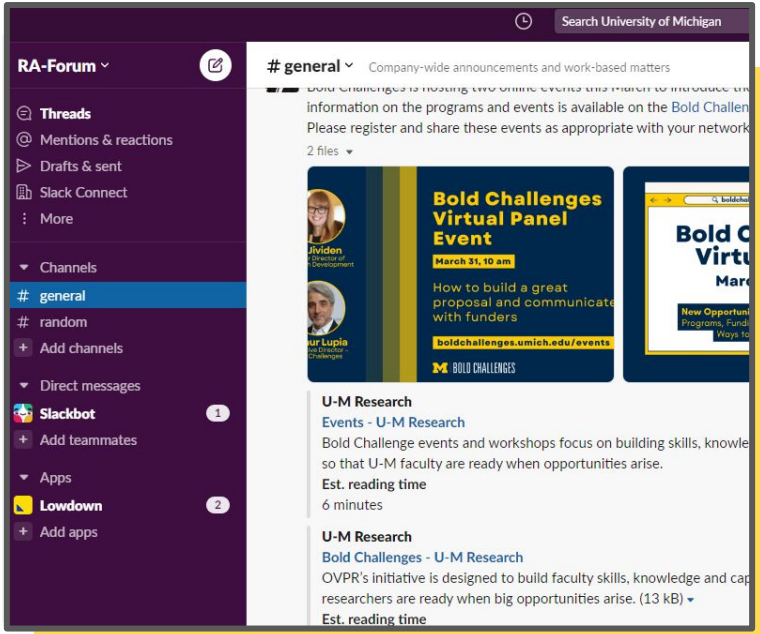
RAAC DEI Workgroup

RAAC DIVERSITY, EQUITY & INCLUSION WORKGROUP

- We are planning a June newsletter and please contact raac.dei.help@umich.edu and request to subscribe.
- In response to the RAAC Survey, we are compiling resources and tools related to inclusive hiring practices. We are excited to share more as we continue this work!

Don’t forget to join us on Slack!

- We continue to grow the RA Forum on Slack.
- Announcements, job postings, sharing resources and best practices, getting to know other RAs, and more!
- um-orsp-ra-forum.slack.com



Screenshot of a post from the RA Forum on Slack.

Thank you!

ITS Update

May 17, 2023
Research Administrators' Network (RAN) Meeting
Carolyn Pappas / Program Manager, ITS

eResearch Proposal Management (eRPM) system update

As of Monday, May 15, 2023

- **New!** Sponsor Information question for federal sponsors on PAFs and CTRFs
- **New!** SUBKs tab on Award now displays in a sortable, filtered list
- **New!** Award Mod/ACR supporting documents enhancement

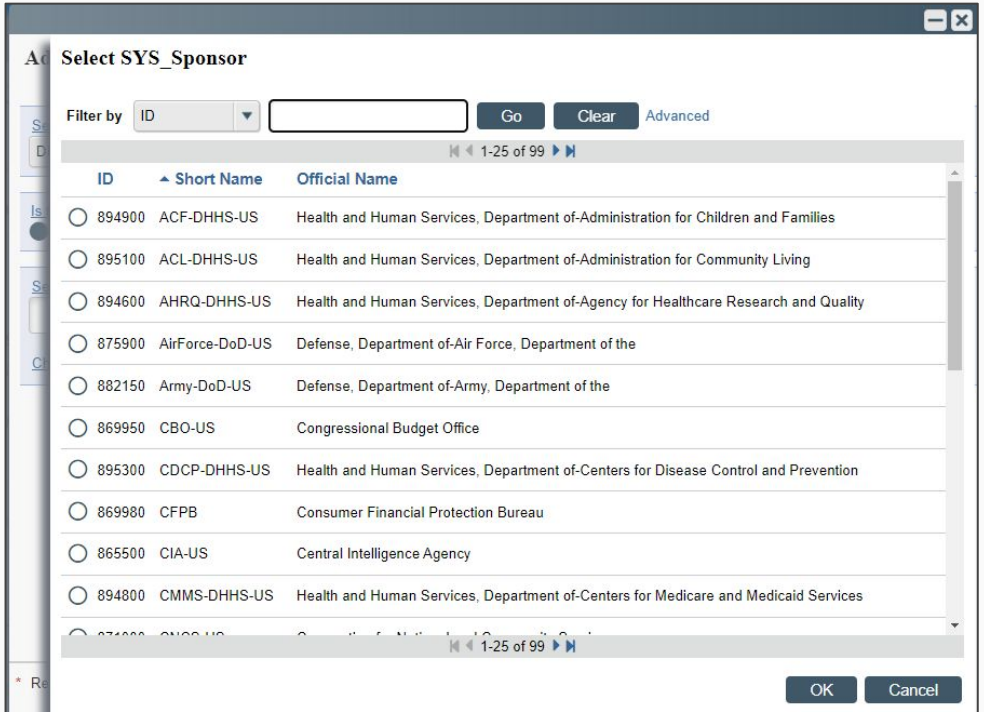
eRPM: Sponsor Information changes

- Proposal Approval Form (PAF) and CTRF changes
  - New, required question within **1.7** to indicate:
    Is the sponsor is a U.S. Federal Government entity?
    - **If yes,** select the U.S. Federal Government sponsor (code).
  - *Affects all newly created and editable/in-process PAFs*

eRPM: Sponsor Information changes

- Ability to search for and enter the entity's sponsor code

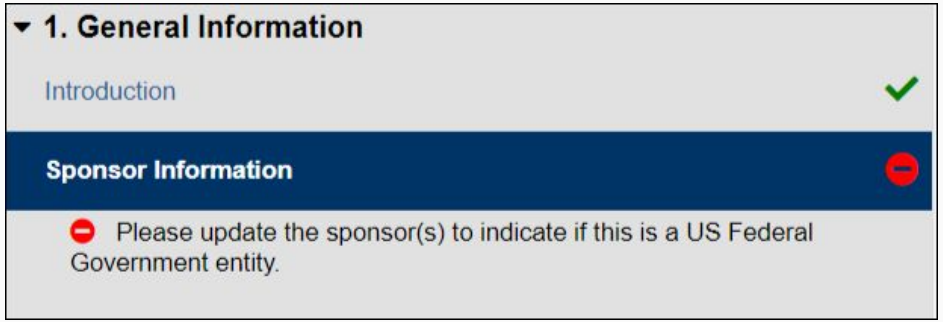
  Note: Each sponsor has two codes, one for **Direct** and one for **Prime**. eRPM automatically filters the lists so only the relevant code displays.



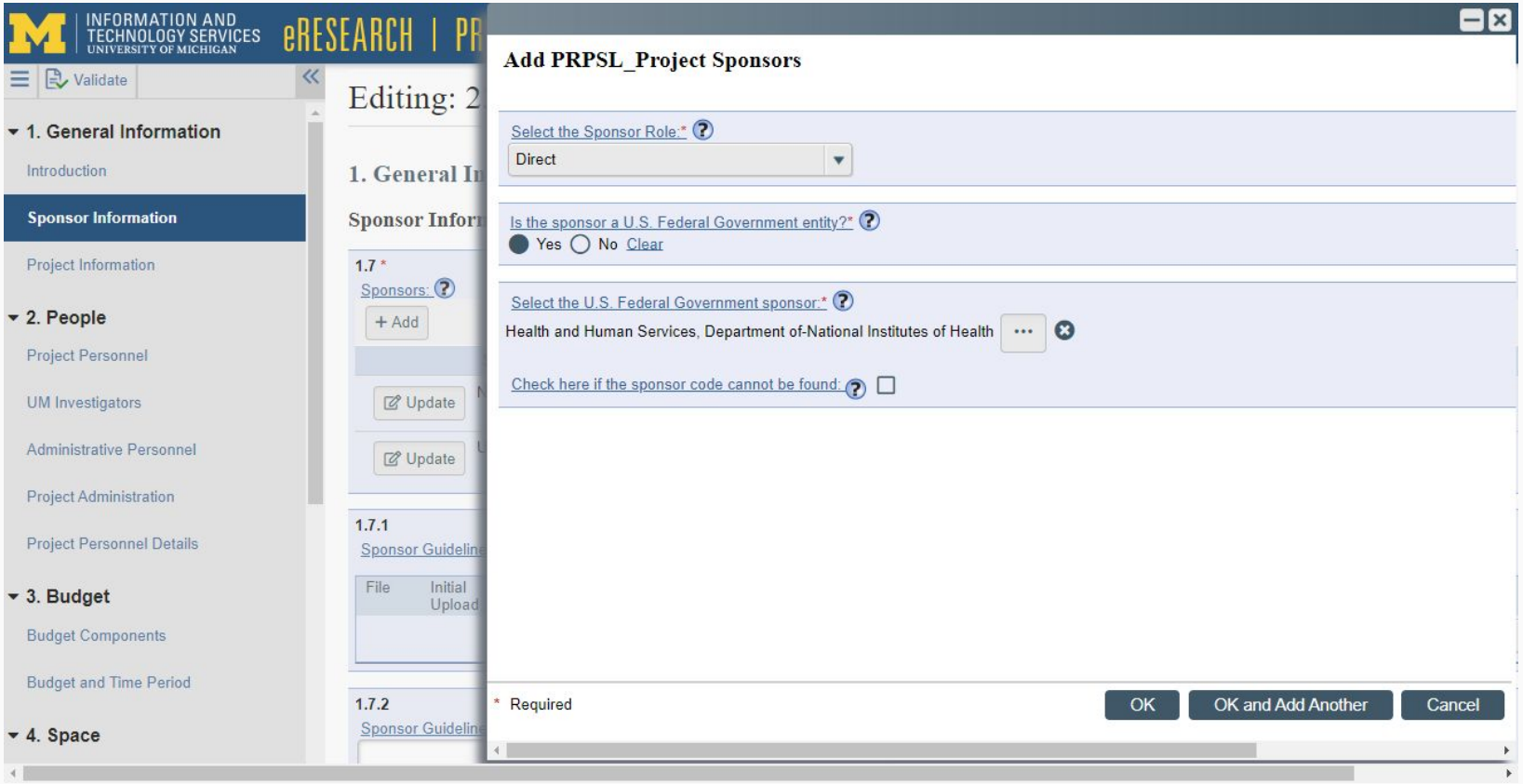
- **Filter by**
  - ID
  - Short Name
  - Official Name
- **Tips**
  - Use (%) wild card and acronym
  - See Short Names and Codes for U.S. Federal Entities in eRPM reference

eRPM: Sponsor Information changes

- Smartform Validation Rule to ensure the new question is answered



eRPM: Sponsor Information changes

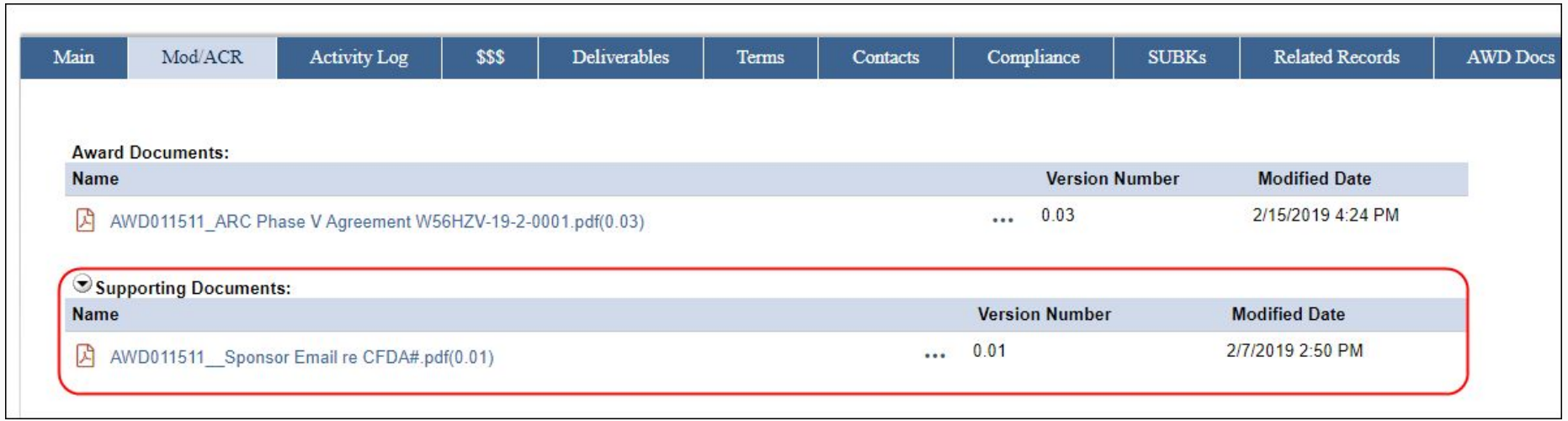


eRPM: Sponsor Information changes

- **Resources to Learn More**
  - Updated Help within eRPM, question 1.7
  - Add/Update Sponsor Information job aid with more screenshots
  - Demo of PAF Sponsor Information *(1 minute video)*
  - Short Names and Codes for U.S. Federal Entities complete list and instructions on ORSP's website
  - eRPM Version 7.0 release notes

eRPM: Award Mod/ACR Tab Update

- Added a **Supporting Documents** list to the **Mod/ACR** tab of the Award (AWD) workspace
  - Conditionally displays links if there is one or more Support Documents attached
  - Toggle can be expanded and collapsed



eRPM: Other Updates

- PAFs
  - Changed the available selection choices for CTSU questions to M-CTSU and O-CTSU, to reflect the consolidation from seven to two offices.
- Unfunded Agreements
  - Resolved an issue where the Central Office Name was cleared when the category type was changed on UFAs and UFAs were getting stuck in the state of “Project Team Making Changes.”

Thank you!

Sponsored Programs Update

May 17, 2023
Research Administrators' Network (RAN) Meeting
Kristie Beckon / Assistant Director, Finance-Sponsored Programs

Audit update

- The 2022 Single Audit is complete.
  - Higher Education Emergency Relief Fund (HEERF) finding.
  - Transposition error associated with Provider Relief Fund (PRF).
- The 2023 Single Audit process is underway.

Equipment Inventory

- Property Control is working with units to locate all assets
- A reminder about the Navigate eLearning module – Monitoring Capital Equipment: RA Best Practices

Full Link – https://maislinc.umich.edu/Core/pillarRedirect?relyingParty=LM&url=core%2Factivitydetails%2FViewActivityDetails%3FActivityId%3D70623%26UserMode%3D0

479

Current late closeouts

Current active = 1,236

Partnership and collaboration go a long way.
There is almost nothing we can’t accomplish together!

Personnel updates

New Research Admin Asst

- Clare Light - UG reports

New Reporting Accountants (temps)

- Robert Barker
- Tiyashia Poole
- Ling Zhang

Robert Barker

Clare Light

Tiyashia Poole

Ling Zhang

Thank you!

ORSP Update

May 17, 2023
Research Administrators' Network (RAN) Meeting
Andrea Anderson / Associate Director, ORSP

Agency Updates

Grace X. Ma: NIH-sponsored researcher focused on health disparities research among underserved and vulnerable racial/ethnic minority populations. In 2021 she co-chaired the inaugural NIH Asian American Pacific Islander Health Scientific Interest Group Seminar.

Photo Credit:
Temple University, Lewis Katz School of Medicine.

NIH Updates

National Institutes of Health

- **NIH is transitioning its funding opportunity terminology to better align with Uniform Guidance.**
  - Notice of funding opportunity (**NOFO**) to refer to formal announcements of the availability of Federal funding through a financial assistance program.
    - Previously referred to as funding opportunity announcements (**FOAs**)
    - See the NIH Grants & Funding Glossary for the full definition.
  - Effective immediately; NIH is currently updating websites, documents, and other resources to reflect the new terminology.
- **NIH carry-forward prior approval**
  - When you do not have automatic carryforward you need to obtain approval before you spend the carryforward funds. NIH is taking a hard line on this and denying expenses that have already occurred.

NSF Account Management System Expands

- **Now Includes Reviewers**
  - Account Management System in Research.gov has self-managed profile
  - Uses unique **NSF ID** for all business throughout research career
  - Principal Investigators (PIs), Graduate Fellows, and other Administrative Officials already had access
  - Reviewers now do too
- **New Gender Response Option in Self-Managed Profile**
  - Self-managed Profile has new gender response options under demographic information, expanded to include a new "Unspecified, or another gender identity" selection for reviewers, PIs, and postdoctoral fellows in Account Management
  - See **https://www.research.gov/research-web/content/aboutaccountmanagement**

NSF Virtual Grants Conference Spring 2023

- June 5 – 8, 2023
- Registration free and opened Wednesday, May 10
  - https://new.nsf.gov/events/nsf-virtual-grants-conference-june-5-8-2023
- All recorded conference sessions will be available on-demand shortly after event on NSF's YouTube page

U.S. Federal Government Entities

Related to Carolyn's ITS Update, here are some ORSP resources for RAs and Project Teams to note.

- ORSP website has table of the complete list of short names for the federal sponsors in the Route & Submit section: orsp.umich.edu/route-submit-proposal/short-names
  - Ex: National Institutes of Health (NIH) projects use one code if its the direct sponsor (895700) and another for the prime (895800).
- This link is in eRPM.
- ORSP will still validate that these codes have been entered correctly.

Annual RPPR Reminders

Help us remind project teams to:

- Route Annual RPPRs 2 weeks before the due date to ensure time for the necessary back-and-forth edits, questions, and answers.
- Check ORSP's instructions to ensure routing goes to the right person in eRPM and Commons. Typically, this is one of our support staff members and not a project representative.

On the Home Front

Photo Credit: © Corey Seeman, Univ. of Mich. Squirrels, Flickr

Other Staff Updates - Departures/Hiring

- **On the Move**
  - Neil Carver (now at OVPR, Research Development)
  - Raymond Cluckey (now at Innovation Partnerships, Corporate Relations)
  - Caitlin Jost (now with OVPR Export Controls)
- **Retirements**
  - Linda Chadwick
    - Gratitude for her many leadership roles not only at ORSP but also in research administration throughout the University and on the RAAC Executive Committee
- **Interviewing**
  - Three (3) Private Team PR positions
  - One (1) Government Team PR positions

Welcome New Staff!

Jeff Alber
Project Representative
Private Sponsors Blue Team
(Engineering,Natural Sciences)
Reporting to Emily Baxter)

Jelly French-Gilmore
Support Staff
Reporting to Tracy Schwab

Austin Hogg
Assistant Project Representative
Government Sponsors Team
Reporting to Daniela Marchelletta

Elena Taryor
Assistant Project Representative
Private Sponsors Maize Team
(Health Sciences)
Reporting to Joe Johnson

Promotions and Role Changes

Kellie Buss
Assistant Managing PR for Government Sponsors Team

Joe Johnson
Assistant Managing PR for Private Sponsors Team

ORSP Government Team

Karen Alameddine

Managing Project Representative, Government Sponsors Team

Kellie Buss, Asst Managing PR

- Reynaldo Martell, Senior PR
- Patrick Case, PR
- Karen Sampson, PR
- Becca Timmermans, PR
- Jake Young, Asst PR
- Caitlin Nagler, Asst PR

Ryan Lankton, Asst Managing PR

Daniela Marchelletta, Asst Managing PR

- Tracey Larkin, Senior PR
- Christy Bohensky, PR
- Lizzie Howard, PR
- Erin Kingsley, PR
- Amanda Reel, PR
- Austin Hogg, Asst PR
- Sara Sanders, Asst PR

ORSP Private Team

Patrick Woods
Managing PR
Private Sponsors Team

Emily Baxter, Asst Managing PR, Blue Team
Emily's Team includes:

- Jeffrey Longe, Senior PR
- Jeff Alber, PR
- Kate Chie, PR
- TBD
- TBD

Lark Haunert, Asst Managing PR, Clinical Trials
Lark's Team includes:

- Debra Dill, Senior PR
- Patricia Haynes, Senior PR
- Mike McAllister, Senior PR
- Beth Wenner, Senior PR

Joe Johnson, Asst Managing PR, Maize Team
Joe's Team includes:

- Dan Garber, PR
- Arielle Javarinis, PR
- Thomas Paluchniak, PR
- Shannon Lester-Pelham, Asst PR
- Elena Taryor, Asst PR

Eric Ward, Asst Managing PR, DUA Team
Eric's Team includes:

- Michael Hudson, PR
- Gabrielle Hammoud, Asst PR
- Michele Quick, Asst PR

ORSP Volume

7,531
Proposals reviewed and submitted in FY2022
2,763
Awards processed through ORSP in FY2022
2,004
Unfunded Agreements executed by ORSP in FY2022 (nondisclosure, data use, etc.)

OVPR Updates

VISION 2034

ANN ARBOR | DEARBORN | FLINT

- See Survey link in Dr. Cunningham's recent VPR Update
- We are all being asked to imagine what the University of Michigan will look like and accomplish over the next 10 years.
- Tremendous opportunity to identify ways in which we can build a brighter future for the U-M research enterprise.
- https://vision2034.umich.edu/

New OVPR Email for Publication Restriction AAR Status

- New email for Publication Restriction Status
- Use this to notify OVPR if the request is time-sensitive or status.
    - ovpr.pub.restriction.status@umich.edu
    - Thank you to Melissa Karby for creating this in response to RAAC Survey feedback!

- **FYI on Other Types of AARs**
    - Note that most AAR types don't require OVPR involvement.
    - Visit the ORSP website's **Agreement Acceptance Request** webpage (orsp.umich.edu/aar) to learn more the other changes that could trigger an AAR
        - e.g., funding change ≥ 20%, cost sharing change, F&A rate change

2023 OVPR Research Staff Recognition Awards

Thank you!

Closing Remarks

May 17, 2023
RAN Meeting

Quick Poll – RAN Meeting Relevance

This poll is anonymous.

Please tell us how relevant you found today's meeting content, on a 5-point scale:

1. Not relevant
2. Slightly relevant
3. Moderately relevant
4. Relevant, or
5. Highly relevant

Thank You for Attending RAN!

Thank you to our Emcee, the RAAC Metrics subcommittee, the RAAC Communications subcommittee , and to you for joining us today.

Stay connected on the Research Administrators' Forum on Slack, and Virtual Networking sessions.

RAN 2023! Next RAN meeting is scheduled for October 26th - save the date!

"There is a great satisfaction in building good tools for other people to use."
- Freeman Dyson

Professional Development Updates

May 17, 2023
Research Administrators' Network (RAN) Meeting

National Council of University Research Administrators (NCURA)

NCURA
Supporting Research...*together*™
National Council of University Research Administrators

NCURA Region IV

- The 2024 NCURA Region IV Spring Meeting will in Ann Arbor, MI.
  - April 28-May 1, 2024.
  - More details forthcoming.

Visit ncuraregioniv.com for more information

NCURA National

- Next NCURA Annual Meeting – August 6-9, 2023, in Washington, DC.
  - Visit the meeting website for more information.
    - Full meeting website URL – https://www.ncura.edu/annualmeeting/Home.aspx

Go to ncura.edu for more information

Society of Research Administrators International (SRAI)

SRAI National Meeting

- October 14-18, 2023 in Seattle, WA.
- Early Bird Registration is open through August 25, 2023.

https://www.sraannualmeeting.org/2023/index.cfm

National Organization of Research Development Professionals (NORDP)

NORDP National

- Save the date for the next virtual conference, to be held November 1-3, 2023.

Go to nordp.org or nordpnews.org for more information.

Additional Announcements

May 17, 2023
Research Administrators' Network (RAN) Meeting

Data Den Research Archive Service

- The U-M Research Computing Package (UMRPC) is offering the Data Den Research Archive Service.
- Researchers can store **up to 100TB of data at no cost**, even after a grant has ended.
- The service is best for data that is not regularly needed, but needs to be retained per the grant terms and conditions.
- Visit https://arc.umich.edu/data-den/ for more information.

Navigate Training Information

Navigate E-ssentials eLearning

New Module – Introduction to Department of Defense (DoD) Sponsored Projects.

- 15-20 minute course introduces best practices and key terminology.
- Good for those who are new to DoD project administration.
- Includes a job aide – DoD Common Terms and Definitions.

Additional Training Resources

- Navigate *E*-ssentials eLearning Modules available anytime.
- Access the Navigate Video Resources page to view recordings of previous webinars, lunch & learn sessions and more.

M | NAVIGATE

Kudos and Thanks!

May 17, 2023
Research Administrators' Network (RAN) Meeting

OVPR Research Staff Awards

Congratulations to our RAAC colleagues who have been recognized as the **2023 Research Administration Recognition Award** recipients!

Register for the recognition ceremony – **May 24, 2023 at 3:30 p.m. in University Hall, Ruthven Building** – at the Research Staff Awards Website.

Full Research Staff Awards Website URL:
https://research.umich.edu/research-at-michigan/research-recognition-awards/research-staff-awards/

Becky Youmans Demoss
Research Administration Senior Manager, Medical School

Sheree Temple
Research Administration Senior Manager, College of Pharmacy