### Session 1
**Introduction to Facilities and Administrative Costs**

Facilities & Administration (F&A) revenue is critical to supporting the research infrastructure at the University of Minnesota. This presentation will provide an introduction to F&A costs including what they are and why they are important, an overview of the F&A rate development process, and tips on how to run the F&A Recovery report.

*David Hagen, Director, Office of Cost Analysis*
*Holly Schuveiller, Senior Financial Analyst, Office of Cost Analysis*

### Session 2
**Getting to Know Business and Industry**

This introductory session will highlight the differences between industry projects/clinical trials and those funded by government/non-profit entities. Learn how to utilize the expedited PRF for clinical trials, information regarding Master Agreements, F&A rates for industry projects and more. This session will be in a panel format.

*April Anderson, Senior Grant and Contract Administrator, Sponsored Projects Administration*
*Sarah Danner, Grant and Contract Administrator, Sponsored Projects Administration*
*Bridget Foss, Senior Grant and Contract Administrator, Sponsored Projects Administration*
*Tom Schouweiler, Grant and Contract Administrator, Sponsored Projects Administration*

### Session 3
**Effort Calculations 9/12**

This advanced session will include three in-depth discussion of 9/12 appointments and how to properly certify effort. These will include situations such as managing academic year and summer appointments, cost share and others. Attendees will come away with a clearer understanding of how to manage specific, difficult appointment situations specific to 9/12 appointments and should come prepared with knowledge of how to manage basic 9/12 appointments.

*Donald Hammer, Analyst, Office of Cost Analysis*
*Terry Klosterman, Accounting Supervisor, Department of Psychology*
*Jackie Lee, Finance Manager, College of Food, Agricultural & Natural Resource Sciences*
*Mia Rampi-Lambertz, Accountant II, Department of Civil, Environmental, and Geo-Engineering*
*Rachel Veenstra, Finance Analyst, College of Science and Engineering*
Session 4

LIFECYCLE OF A SUBAWARD: WHAT YOU NEED TO KNOW

Do subawards make you stressed? From proposal requirements to paying invoices, the ever-evolving process may seem overwhelming. This beginner level session will review the requirements for the entire lifecycle of a subaward, from FCOI to the new electronic invoice approval system, and explain why the requirements are in place. By taking a step-by-step approach to subawards, we hope to assist you by providing the tools and understanding so subawards will no longer fill you with dread but fill you with happiness instead!

Crystal Langeberg, Finance Professional 2, College of Food, Agricultural & Natural Resource Sciences
Andrea Marshall, Principal Grant Administrator, Sponsored Projects Administration

Session 5

REPORTS! REPORTS! FINALLY ANSWERS! WHERE ARE THE NUMBERS COMING FROM?

This advanced session will provide information about various sponsor’s financial reporting requirements and how the data is compiled by Sponsored Financial Reporting. We’ll identify the various reporting data elements and where they are in the University’s financial system (UM reports). Items discussed will include reportable program income, TIP, cost share, the F&A base and amount. Finally, we’ll conclude with examples of actual invoices/reports used.

Stephanie Kranitz, Finance Professional 3, Sponsored Financial Reporting
Kathy Krum, Finance Professional 3, Sponsored Financial Reporting

Session 6

RCO’S RISK HEAT MAP

This will be a high level discussion of the concept of Risk Heat Maps and how we are using them in the Risk Compliance Office (RCO). We will discuss how the risk heat map helps visualize and manage risk in the sponsored projects environment. We will explain how we determined the research compliance risks for RCO, defined the parts of the heat map so they would work in our area, and how we use the risk heap map to determine our workplan.

David March, Assistant Director, Research Compliance Office
Mary Olson, Business/System Analyst, Research Compliance Office
Susan Richards, Research Compliance Office
Session 7

**CREATING A DATA MANAGEMENT PLAN FOR FEDERAL FUNDERS**

The new buzz phrase in research is “Data Management Plans.” This session will clear up the mysteries of what a Data Management Plan (DMP) is and outline recent changes to data management requirements from federal funding agencies. We will specifically discuss components of successful DMPs. Attendees will come away with a better understanding of DMPs and knowledge of the University resources available to assist researchers in writing and implementing these plans.

*Caitlin Bakker, Biomedical/Research Services Librarian, University of Minnesota Libraries
Alicia Hofelich Mohr, Research Data Manager, Research Support Services, CLA LATIS*

Session 8

**PUBLIC ACCESS POLICIES ACROSS FEDERAL AGENCIES**

In February, 2013 the White House *Office of Science and Technology Policy (OSTP)* recommended sweeping changes to policies regarding public access to peer-reviewed scientific publications resulting from federally funded research. We have seen what public access policy implementation has meant to NIH and other Department of Health and Human Services agencies, come join us in a review of other agencies plans posted to date, what are the highlights from each plan, public access policy compliance requirements as it pertains to grant funding and University resources to help assist with compliance.

*Katherine Chew, Associate Librarian, Health Sciences Libraries*

Session 9

**PRE-AWARD BEYOND THE BUDGET: PROMOTING RESEARCH DEVELOPMENT AT THE UNIT LEVEL**

Before PIs are ready to compile a budget or fill out a Grants.gov application package, many things need to fall into place. This panel discussion will provide an overview of a number of activities and programs implemented in different unit contexts to proactively support the search for external funding. Attendees will participate in an engaged discussion about where their skills and expertise fit on this continuum and will come away with a broader understanding of how they can maximize the impact of their contributions to the pre-award process. All levels of experience are welcome.

*Anna Brailovsky, Grants Coordinator for the Social Sciences, College of Liberal Arts
Laura Olevitch, Collegiate Grants Coordinator, College of Food, Agricultural & Natural Resource Sciences
Gina Rumore, Program Development Coordinator, MN Population Center
Kersten Warren, Research Coordinator, Veterinary Medicine*
**Effective Proposal Processing is Only a “Chunk” Away**

Processing a proposal is like chunking chocolate for cookie batter; if you can break it down to manageable components, it’s much easier to achieve success. This beginner presentation and panel discussion will cover how to get started with the process, decoding the RFP, handling internal deadlines and understanding proposal compliance issues. Checklists and best practices will be shared in this basic approach to creating the “perfect chunk” cookie.

*Karen Hawkinson, Grants/Contracts Prof 3, Neuroscience*
*Elizabeth Hedin, Assistant to College of Education and Human Development*
*Sallie Quammen, Grants/Contract Prof 3, College of Education and Human Development*
*Frances Spalding, Training Coordinator, Sponsored Projects Administration*

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**Navigating the Gray Area - Tricky Approval Scenarios (Basic Session)**

Have you encountered approval situations that have left you stumped? When a faculty member asks if they can make a specific purchase, do you find yourself answering with "Maybe" or "It Depends"? Are you a preparer and want to know more about the decision making process approvers use when dealing with tricky scenarios? Well, you're not alone! Departmental preparers and approvers can all agree that not all purchasing and reimbursement situations are the same... Join us for an introductory roundtable session that will review real-life case study examples of tricky approval scenarios. Newer preparers and approvers are encouraged to attend this session. More experienced preparers and approvers are encouraged to attend the Advanced session.

*Jay Delaney, Financial Cluster Director, College of Science and Engineering*
*David Hagen, Director, Office of Cost Analysis*
*David March, Assistant Director, Research Compliance Office*
*Kevin McKoskey, Director, Sponsored Projects Administration*

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**Patent Law for Researchers and Student Ownership of Intellectual Property**

This session will address the types of inventions for which patent protection may be obtained and the importance of disclosing inventions to the University’s Office for Technology Commercialization. This session will also address recent changes in the law regarding patentability, particularly for inventions in the areas of molecular biology and computers/software. Student ownership of intellectual property will also be discussed.

*Karen Kaehler, Office for Technology Commercialization*
*Paul Savereide, Office of the General Counsel*
*Tom Schouweiler, Grant and Contract Administrator, Sponsored Projects Administration*
Session 13

ANATOMY OF A CLINICAL TRIAL

This advanced session will describe the various components and systems within the University to coordinate and manage clinical trials. Speakers from the Clinical Translational Science Institute (CTSI) and Sponsored Projects Administration (SPA) will present a full spectrum of activities from protocol inception to final closeout. If you’ve ever wondered how clinical research works at the University of Minnesota, what support is available, or who is responsible for which component, this is the session for you. Participants should have a general knowledge of the University’s research contracting process prior to attending this session.

Anne M. Mockovak, Program Director, CTSI Financial Hub  
Deb Reid, Grants/Contracts Prof 4, CTSI Financial Hub  
Laura Williams, Principal Grant and Contract Administrator, Sponsored Projects Administration

Session 14

NAVIGATING THE GRAY AREA - TRICKY APPROVAL SCENARIOS (ADVANCED SESSION)

Have you encountered approval situations that have left you stumped? When a faculty member asks if they can make a specific purchase, do you find yourself answering with "Maybe" or "It Depends"? Are you a preparer and want to know more about the decision making process approvers use when dealing with tricky scenarios? Well, you're not alone! Departmental preparers and approvers can all agree that not all purchasing and reimbursement situations are the same... Join us for an advanced roundtable session that will review real-life case study examples of tricky approval scenarios. More experienced preparers and approvers are encouraged to attend this session. Newer preparers and approvers are encouraged to attend the Basic session.

David Hagen, Director, Office of Cost Analysis  
Jennifer LaFrance, Finance Manager, Department of Electrical and Computer Engineering  
David March, Assistant Director, Research Compliance Office  
Kevin McKoskey, Director, Sponsored Projects Administration

Session 15

TASK ORDER CONTRACTS: AN OVERVIEW BASED ON USER EXPERIENCES

This session will be an overview of Task Order Contracts from pre-award to close-out as managed by the Health Policy and Management (HPM) model. The overview will cover the concepts of task orders, how they differ from grants, terminology, and include some of the challenges that come along with these funding mechanisms. Attendees with in-depth involvement in the grant process will find the most benefit from the session but all are invited to participate. We will also share HPM’s best practice with: Review of the Request for Proposal (RFP); Setting up project management “to-dos” list that includes a timetable schedule for the RFP; Finding common information for the RFP; and How to handle invoice and reporting.

Karen Sachi, Principal Grants and Contracts Administrator, Sponsored Projects Administration  
Frances Spalding, Training Coordinator, Sponsored Projects Administration  
Sarah Trachet, Grants/Contracts Prof 3, Public Health Policy Management
Session 16

**DIFFERENT SHADES OF LEADERSHIP – WE ARE ALL LEADERS**

The session will look at characteristics of different concepts of leadership: Leadership in Context, Personal Leadership, Team Leadership, and Organizational Leadership and highlight real life examples. Discussion will center on recognizing the opportunities and potential ways to apply the different leadership concepts to everyday life.

*Sue Paulson, Assistant Controller, Controller’s Office*

Session 17

**INTERNATIONAL RESEARCH COLLABORATIONS – YOU GOT THIS**

Over the past century, conducting research with colleagues abroad has become increasingly easy, fruitful, and in many cases, necessary. These collaborations bring not only rewards, however. Often they also entail unexpected risks and complications. Please join us for a panel discussion on the issues that can add extra excitement to international cooperation. From both pre-award and post-award perspectives, we'll offer advice on coping with matters ranging from compliance to cash flow, hiring to hazardous materials, and visas to vehicles.

*Patrick Briscoe, Research Compliance Office*

*Chris Dillon, College of Veterinary Medicine*

*Molly McCoy, Division of Global Pediatrics, Center for Global Health & Social Responsibility*

2:15-3:00 Session

**UNIFORM GUIDANCE JEOPARDY**

Think you know Uniform Guidance and would like to test your knowledge? Come to a live game show where you may be selected to compete for prizes. This University of Minnesota Jeopardy Game will quiz your knowledge on this sweeping new set of OMB regulations and if you win you will have not only the title of University of Minnesota Jeopardy royalty you will walk away with winnings that will turn the heads of your colleagues.

*Nicole Pilman, Uniform Guidance Implementation Coordinator*

*Frances Spalding, Training Coordinator, Sponsored Projects Administration*

*Pamela Webb, Associate Vice President for Research Administration*

2:15-3:00 Session

**LIGHTNING TALK – PREAWARD TOPICS**

This fast paced session will include information on three preaward topics. Each topic will last only five minutes and provide the audience with an understanding of the new SPA proposal deadline, how to avoid common proposal issues, and the difference between a preaward and advance account. Yes! It is possible for you to learn the essential points of each topic in five minutes.

*Amy Rollinger, Principal Grant and Contract Administrator, Sponsored Projects Administration*

*Amy Skog, Senior Grant and Contract Administrator, Sponsored Projects Administration*
2:15-3:00 Session

**POSTERS**

**Overview of SPA and SFR**  
April Anderson, Senior Grant and Contract Administrator, Sponsored Projects Administration  
Christina Cheung, Finance Professional 2, Sponsored Financial Reporting

**Certified Approver Program**  
Shaun Kershner, Finance Professional 3, College of Science and Engineering  
Megan Vimont, Finance Professional 3, School of Dentistry  
Wendy Willner, Finance Professional 3, Department of Surgery

**Subaward vs. Contract for Profession Service (CPS)**  
Pat Jondahl, Senior Grant and Contract Administrator, Sponsored Projects Administration

**Fly America**  
Patrick Briscoe, Research Compliance Office

**Data Management**  
Caitlin Bakker, Biomedical/Research Services Librarian, University of Minnesota Libraries  
Katherine Chew, Associate Librarian, Health Sciences Libraries  
Lisa Johnston, Research Data Management/Curation Lead and Co-Director of the University Digital Conservancy, University of Minnesota Libraries

**College of Liberal Arts (CLA) Centered Data Management Plans**  
Alicia Hofelich Mohr, Research Data Manager, Research Support Services, CLA LATIS