Research Administration Advisory Council (RAAC)
Committee-at-Large

Tuesday, May 19, 2020, 3:00 – 4:30 pm
Zoom Meeting
Zoom Meeting Information: https://umich.zoom.us/j/93356464267
MINUTES

Attendees:

Andrea Anderson – ORSP	**Teresa Herrick** – SEAS	**Becky O'Brien** – Information
Steve Beach – LSA	**Jennifer Huntington** – Ross School	**Stacy Orban** – SSC
Kristie Beckon – Sponsored Programs	**Laura Kaminski** – Ford School	**Carolyn Pappas** – ITS
Beth Brant – Medical School	**Melissa Karby** – Dentistry	**Lisa Parker** – IRWG
Cheri Brooks – ISR	**Karen Kirchner** – Nursing	**Craig Reynolds** – ORSP
Judy Carrillo – Medical School	**Heather Kraus** – LSA	**Jane Sierra** – Medical School
Constance Colthorp – ORSP/Sponsored Programs	**Patrick Lagua** – Dentistry	**Danielle Smith** – LSI
Cindy Dames – ORSP	**Mindy LaRocca** – SPH	**Debbie Talley** – Sponsored Programs
Lori Deromedi – UMOR	**Jonah Lee** – ACUO	**Sheree Temple** – Pharmacy
Kathy Devereux – UMOR	**Charlie Mattison** – ISR	**Pat Turnbull** – Dearborn
Chris DeVries – RAAC	**Jan Mitchell** – Pharmacy	**Bryan VanSickle** – Sponsored Programs
Linda Forsyth – Engineering	**David Mulder** – ORSP/Sponsored Programs	**Rick Wintergerst** – Engineering
Stephanie Hensel – Education		

1. **Welcome** (*Craig Reynolds*)

    Craig called the meeting to order at 3:00 p.m. This meeting will be shortened due to having the RAN meeting tomorrow during which the ORSP, Sponsored Programs, and ITS updates will be providing the same information.

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

Membership
   ● Kellie Buss replaced Lark Haunert for ORSP.
   ● Jessica Mirelez replaced Emily Hamilton for Michigan Medicine.

Navigate Training Opportunities
    The Navigate Spring in-person courses were canceled. On the positive side it gave us the opportunity to look at offerings and do some revamping on the following courses:
   ● Advanced Budgeting – Internal Proposals with Cost Sharing: Looking to change to an eLearning module with a lab.
   ● Budgeting Basics: Nick Prieur and Judy are working to move the course to an online, live video learning opportunity.
   ● Advanced Budgeting – Department of Defense:

- Creating a work group consisting of representation from Engineering, Michigan Medicine, and ORSP. The kick-off meeting for this will be later in May.
- Format to be determined (instructor-led, online, etc.)
- Available in the Fall.

Considerations for revamping Navigate courses:
- Limit lectures to keep interest & reduce distractions.
- Create breakout rooms for group activities.
- Leverage eLearning modules.

We hope to pilot the new formats in the Fall. Additionally, eLearning modules are available online and most of the content is taken from the Fundamentals course. Judy gave a special thanks to Dave Nassar who put together the modules.

RAMP↑ Mentoring Program:
- The 6th cohort runs from October 2019 – July 2020.
- Began with 15 matched pairs but a couple left the university.
- We are evaluating how to handle the program for the next cohort.

New Webinar Series

The Navigate team introduced a new Webinar series. The first webinar was held on May 7, 2020 on the topic of SciENcv. This webinar was conducted in partnership with Taubman Health Sciences Library. Marci Brandenburg was the presenter and provided great information and materials. We are looking for other webinar opportunities (e.g., MyBibliography, PMCID Compliance) and let us know if you have other suggestions for topics. Craig suggested having Jake Carlson do a webinar on Deep Blue. Judy will reach out to Jake.

There is a new webinar web page on the Navigate site ([Navigate: Webinars](#)). You may review Marci's presentation under the [Past Sessions](#) card along with the job aid. New topics will be posted under the Upcoming Sessions card.

Work in Progress

Useful BusinessObjects Reports:

We collaborated with RAAC Metrics to look at ways we can provide useful reports for Research Administrators. We will be using the M-Reports Report Library (which is linked on Wolverine Access) to catalog the reports.

Chris Allan (Chair of RAAC Metrics) was given access to the Report Library to add report entries. RAAC Training will assist with reviewing the report descriptions and suggesting modifications as needed. We're hoping we can have this ready to go soon.

BusinessObjects for Research Administrators:

This will be a full-day course for true beginners, and we will be announcing a pilot soon. We'll likely hold the training in computer rooms at Wolverine Tower. The course will be limited to 12 participants and the course content will include introductory information previously presented in two IT4U webinars and Lunch & Learn sessions, as well as advanced topics and hands-on query/report exercises.

Craig likes the idea of training for Business Objects, and would like to reach a broader audience. Judy said we are limited who can teach the course, but will continue to monitor.

Competency Roadmap:

The goal of this project is to help the RAAC Training subcommittee identify training gaps and provide research administrators and supervisors with a tool that outlines knowledge, skills, and abilities needed to perform their job. Quite a massive matrix and scaling into an easier format. The project was selected by School of Information students to work on a design for the matrix. The students produced a recommendation on how to deliver a roadmap in easy-to-use format. Currently, the project is on hold due to financial constraints. In the meantime, the Navigate team is working to develop a scaled-down online version until we can move forward with a contract to develop recommendations made by School of Information students.

Faculty Research Administration Portal:

The purpose of the project is to provide faculty with the most succinct actionable research administration- related information. Make the information into more digestible nuggets, but provide links for a deeper dive, if needed.

Right now, we are conducting useability testing with faculty volunteers. The go-live date will depend on the outcome of the useability testing. The portal will be a work-in-progress as more content is developed. The previous acronym – FRANK – did not poll well and the group looking for new ideas.

Thanks to our workgroup members: Lori Deromedi (UMOR), John Christiano (Dearborn); Erin Kingsley (Flint); Amanda Simon (Sponsored Programs); Lark Haunert (ORSP); Patrick Lagua (Dentistry); David Mulder (ORSP); Lyn Fyfe (ORSP).

Complex Project Management

Amy Brooks (Engineering) and Patrick Lagua, co-leads

The goal of this project is to provide course offerings for intermediate Research Administrators. The original topics proposed by the group included:
- Financials (e.g., internal controls, cost transfer JEs; invoicing)
- Human Resources (e.g., recharge rate; payroll; U Year; GSRA appointments)
- Subs of all kinds (how to manage subcontracts; pass-through invoicing; subprojects with U-M)
- Pre-award Management (e.g., contracts; small business plans; compliance)

The work group decided to concentrate on the Human Resources topic now. We will still need to determine if it will be an in-person or eLearning course.

Research Administrator Recruitment Program:

This is a new course that is still under development. The objective is to collaborate in the development of a program to identify and recruit staff in the RA career track to meet the needs of Michigan's growing research portfolio.

Deliverables:
1) To communicate the career pathways in Research Administration.
2) Support growth opportunities with those Research Administration pathways.

Craig gave a big shout out to David Mulder and the Navigate team!

Melissa thanked those responsible for the list of reports in the Report Library. Very happy and asked what the timeline was for the Report Library to be completed. Judy responded that Chris Allan is working on it now, and we are hoping to have this ready soon. Chris DeVries said they are adding index and tabs for better search function, along with filtering for RA reports. No timeframe right now, but gathering information into the library and then soon.

Constance thanked for the help in getting faculty volunteers for the faculty resources portal training.

3.   **Closing and Future Meetings** (*Craig Reynolds*)
     ○   Reminder to sign up for the RAN Meeting, held tomorrow!

Craig reminded everyone would attend the RAN meeting tomorrow to get further updates.

RAAC Committee-At-Large Meeting Dates
- Tuesday, June 16, 2020, 3:00 – 4:30 pm, Wolverine Tower (*Cathy Liebowitz*, RAAC Communications Subcommittee)
- *No July meeting*
- *No August meeting*
- Tuesday, September 15, 2020, 3:00 – 4:30 pm, Location TBD (*Chris Allan*, RAAC Metrics Subcommittee)

Executive Committee Meetings

- Tuesday, June 9, 2020
- Tuesday, July 14, 2020
- *No August meeting*

Research Administration Advisory Council
Committee-at-Large
Training Subcommittee Update
May 22, 2020

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Judy Carrillo
Michigan Medicine

Current Subcommittee Membership

- **Judy Carrillo,** Chair, Michigan Medicine
- **David Mulder**, 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
- **Kellie Buss,** ORSP
- **Lori Deromedi**, UMOR

- **Jeanne Haney,**, Sponsored Programs
- **Sue Kelch,** Michigan Medicine
- **Patrick Lagua**, Dental
- **Terri Maxwell**, ORSP
- **Jessica Mirelez,** Michigan Medicine
- **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

NAVIGATE OFFERINGS

All Training Opportunities available on Navigate Portal Website:

orsp.umich.edu**/navigate**

Also includes video recordings of Lunch and Learn

- Fundamentals
- Uniform Guidance
- *Advanced Budgeting: Internal Proposals with Cost Share - Not offered for Spring. Under discussion for e-learning course with lab*
- Advanced Budgeting: Task-Based/Hourly Budgets
- Lunch and Learn

- Budgeting Basics - Under Construction
- Advanced Budgeting: DoD Budgets - Under Construction

eLearning

- Final module Stewardship released
- List of all modules:

○ Cost Transfer	○ Cost of All Kinds
○ Award Modification	○ Cost Share
○ Financial Monitoring	○ Project Close Out
○ Effort Certification	○ Financial Status Report
○ Understanding Effort	○ UG Cost Principles
○ Proposal Prep & Submission	○ Stewardship
○ Pre-Close Out Analysis	

RAMP↑ Mentoring Program

- 6th cohort runs from October 2019 – July 2020
- Began with 15 matched pairs for the 6th cohort
- Two mentees and one mentor left the University
  - Will have preference for 7th cohort
- Will evaluate program for Fall

SciENcv Webinar

- Navigate Partnership with Taubman Health Sciences Library - Marci Brandenburg
- First webinar a success!
- Looking for other webinar opportunities
  - Some mentions….
    - MyBibliography
    - PMCID Compliance
    - Others? Please let us know!

IDEAS WANTED

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https://orsp.umich.edu/training-workshops/navigate-webinars

Navigate: Webinars

The *Navigate: Webinars* series covers a variety of topics related to research administration at the University of Michigan. The sessions are open to faculty, research administrators, and others involved in research administration in any phase(s) of the sponsored project lifecycle.

PAST SESSIONS

View past Webinar sessions.

GO

UPCOMING SESSIONS

Register for upcoming sessions.

GO

Budgeting Basics -

- Course instructors Nick Prieur & Judy Carrillo working with Navigate team to move course to blended online & live video learning opportunity
- Considerations
  - Limit lectures to keep interest & reduce distractions
  - Create breakout rooms for group activities
  - Leverage e-Learning modules

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Advanced Budgeting DOD -

- Workgroup created to 'dust off' current content
  - Members: Kristin Parrish (CoE); Huimin Ponchart (CoE); Betsy Brouhard (Michigan Medicine); Kellie Buss (ORSP) & Navigate admin team
- Kick-Off meeting to be established late May/early June
- Format to be determined, ie instructor-led; online, etc

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Useful Business Objects Reports

Collaboration with RAAC Metric
- List of RA useful reports created
- RAAC Metric given access to Report Library to allow filter under Research Administration
- Will review Report Description & modify as needed

Business Objects for Research Administrators

- Full day course for true beginners
- Pilot, to be announced
  - Computer room at WT
  - Limited to 12 participants
  - Course content will include introductory information previously presented in two "IT4U" webinars and Lunch & Learn sessions, and then move into more advanced topics, finishing with a series of hands-on query/report exercises.

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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.

- Project selected for School of Information student project. Outcome was recommendation on how to deliver roadmap in easy to use format
- Now on hold due to financial constraints
- Navigate team working to develop scaled-down online version until we can move forward with a contract to develop recommendations made by School of Information students

Faculty Resources - Website Update

- Create a robust research administration training and information resources for faculty
  - Undergoing usability testing with faculty volunteers
  - Go-live date will depend on outcome of testing
  - Will be a work in progress as more content is developed
  - FRANK acronym Faculty Research Administration Need-to-Know did not poll well in user testing.
    - If you have ideas, please let us know!

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); Lyn Fye (ORSP)

Website Prototype for Senior Faculty Resource

New Training Opportunity Under Development - RA Complex Project Management (pre- and post-award)

Co-Leads: Amy Brooks, CoE; Patrick Lagua, Dental

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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)

NEW - Research Administrator Recruitment Program - Under Development

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Objective: To collaborate in the development of a program to identify & recruit staff in the research administrator career track to meet the needs of Michigan's growing research portfolio.

Deliverables: 1) To communicate the career pathways in Research Administration and 2) support growth opportunities within those Research Administration pathways.

Workgroup Members: Kim Angelopoulos (LSA); Judy Carrillo (Michigan Medicine); Sue Kelch (Michigan Medicine); Jessica Mirelez (Michigan Medicine); David Mulder (ORSP); Nick Prieur (ISR); Chelsea Tatchin (Michigan Medicine); Lyn Fye (ORSP); Raquel de Paula Silvius (ORSP)

What's Next?

- Please send us your ideas….

Questions?