



Dear Colleagues,

We are delighted to invite you to the free professional development series (see below) for all higher education administrators, organized as part of [New York University's NYC Research Administration Demonstration \(RAD\) Series](#). RAD was created in partnership with the [Cohort for Efficiencies in Research Administration \(CERA\)](#). The 2021-2022 NYU NYC RAD series consists of the following sessions:

Session One

- Topic: "How to Build Your Own Research Administration Training Program"
- Confirmed Presenter(s): *Helene Brazier-Mitouart*, PhD, Education Manager, Education and Training in Research Administration Office, Research Operations - Weill Cornell Medicine; *Tolise Dailey*, Research and Training Manager - Johns Hopkins University; *Melanie Hebl*, Research Administration Education Coordinator, Office of Research & Sponsored Programs - University of Wisconsin-Madison; *David Hollingsworth*, Director Research Education and Outreach, Sponsored Research Services - Texas A&M University
- Description: Where are we with our training programs today? Where did we start with our in-house research administration training programs? How do we keep up with our learners' needs? Join our conversation, and come ask your questions!
- **When: November 16, 2021 at 12:30pm - 2:00pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Two

- Topic: "Research Administration Essentials"
- Presenter(s): *Nicole Quartiero*, Managing Grant and Contract Administrator - Oregon State University; *Sarah Panepinto*, Director, Grants and Contracts - UT Arlington; *Jamie Caldwell*, External Consultant, Interim Senior Director for Research Administration and Operations - University of Missouri-Columbia; *Nick DeSpirito*, Manager, Accounting & Compliance for Contributions & Investments - New York University
- Description: This session will provide an overview of the education, resources and tools that can be used to aid in fundamental research administration work through a discussion of 2-3 case studies. Presenters will also discuss the main components of a foundational body of knowledge for research administrators. This session will include pre-award and post-award concepts (e.g., budget building, allowable costs, terms/conditions, policy/practice, lessons learned, FAQ's, acronyms, UG basics, etc.) discussed under the compliance and best practice frameworks and with audit risk mitigation in mind. Presenters will also provide an array of tools (e.g., Gift/Grant Decision Tree, Revenue Matrix) that attendees can customize and utilize post-presentation.
- **When: December 7, 2021 at 12:30pm - 2:00pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Three

- Topic: “Where are we? How did we get here? Virtual/hybrid/in-person research administration over the past 21 months and into 2022!”
- Presenter(s): *Lisa Mosley*, Executive Director, Office of Sponsored Projects - Yale University; *Jennifer Ponting*, Associate Vice President for Research Administration & Director of University Research - University of Chicago
- Description: This session is designed to focus on the pandemic and the impact on work for the past 21 months, including adaptations that have occurred for ‘workplace’ dynamics. Presenters will discuss successful strategies for work-life balance, completing tasks using e-tools, navigating Zoom, etc. The session will encourage audience members to submit tips/tricks that they’ve incorporated as research administrators adjust to the 2021-2022 academic year. An objective of the session is to help research administrators adjust to the new normal and factoring in impacts to operations: how to mitigate risk of audit findings, file/data security, challenges of maintaining a sense of community, building trust with faculty via virtual conversations, etc.
- **When: December 20, 2021 at 12:00pm - 1:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Four

- Topic: "Financial Administration Demonstration (FAD) - How Money and Finances are Key to Research Administration"
- Presenter(s): *Lisa Franciosa*, Principal - Franciosa & Associates LLC; *Tracey Volz*, Senior Director, Research Finance Operations - NYU Langone Health; *David Schultz*, Assistant Vice President for Sponsored Research Administration - University of Houston
- Description: This session will focus on financial aspects of research administration. Learning objectives:
 - Intro of financial aspects of research administration
 - Uniform Guidance requirements that govern Federally sponsored agreements including costing throughout the grant lifecycle.
 - Discuss roles and responsibilities of principal investigators, departmental research administrators and central office research administrators.
 - Understand the key financial issues in award management, including pipeline, proposal development, budgeting, direct cost expenditures, cost sharing, cost transfers, documentation of personnel expense, cash management and cash flow, carryovers, available balance, financial reporting and closeout.
 - Understand the facilities and administrative cost recovery and service centers chargebacks.
 - Dashboards/tools for managing financial aspects of research administration.
 - Communication of financial information to principal investigators and research personnel.
- **When: January 21, 2022 at 12:00pm -1:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Five

- Topic: “How to Balance Communication to Support Your Researchers - Advance the Science While Protecting the Institution”

- Presenter(s): *Lisa Mosley*, Executive Director, Office of Sponsored Projects - Yale University; *Jennifer Ponting*, Associate Vice President for Research Administration & Director of University Research - University of Chicago; *Michelle Benson*, Director of Conflicts of Interest Management - Hackensack Meridian Health
- Description: This session is designed to focus on ways to support researchers. Meaning, explain intent of rules and offer solutions (sometimes outside the box) to research administration dilemmas. It's not adequate to explain the how without first stating the why. And, if you can't explain it simply (as a voice of reason), you don't know the subject matter well enough - faculty will see through that and go to someone else for support. There is an art form, in addition to the science form, which calls for being heard (not being justified). This session will include case studies with real quotes/emails/dialogue that helped solve the situation.
- **When: February 25, 2022 at 12:00pm - 1:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Six

- Topic: "International Collaborations - How to Facilitate High Quality Engagements"
- Presenter(s): *Amanda Humphrey*, Director of Award Administration - Northeastern University; *Stephanie Endy*, Associate Vice President for Research - Brown University; *Dr. Kimberly Eck*, Senior Vice President for Research - Emory University; *Dr. Robert Nobles*, Vice President for Research Administration - Emory University
- Description: This session will focus on how to facilitate high quality engagements to advance engagements while protecting the institution. Topics to be covered include: faculty view/voice, academic work (publication, copyright, data ownership, etc), fostering respect across cultures, documenting collaborations, other support/current & pending, audits, promoting compliance across various regulatory regimes, etc. Participants will also learn about strategies to explain intent and how to converse with faculty on these sensitive topics.
- **When: March, 21 2022 at 12:00pm - 2:00pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Seven

- Topic: "Showcase - Innovations in Research Administration"
- Presenter(s): *Roseann Luongo*, Manager - Huron Consulting Group; *Sue Zipkin*, Director, Post Award, Sponsored Programs Administration - University of New Hampshire
- Description: Innovation is the foundation of research and research administration. Research Administrators need to continually evaluate their approach and processes to ensure that the work can be completed in an as efficient and compliant manner as possible. This session will explore how creative leaders develop strategies to maximize innovation while minimizing burden and maximizing efficiency. This session will include examples of operational advances across people, processes and tools that have evolved over time.
- **When: April 8, 2022 at 12:00pm - 1:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Eight

- Topic: "Helping Faculty Find Funding and Research Development"
- Presenter(s): *Nancy Nearman*, Director, Grants Management - SUNY Old Westbury; *Collette Ryder*, Director, Office of Sponsored Programs Administration - The Rockefeller University; *Frances Yee*, Senior Manager, Program Development - The Rockefeller University; *Kris Wolff*, Director, Office of Sponsored Programs - Fordham University
- Description: This session will focus on finding funding and research development. Presenters will include discussion on interdisciplinary research and working with faculty who are not always familiar with major federal sponsors, such as NIH/NSF. Presenters will offer strategies used by offices of all sizes. This session may also include sponsor panelists who will speak about their funding opportunities and offer best practices for being aware of the funding and successfully applying. This session may also include faculty panelists who can share perspectives of both a peer reviewer and an applicant.
- **When: May 6, 2022 at 12:00pm - 1:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Nine

- Topic: "Deep Dive on Challenging Award Terms & Conditions"
- Presenter(s): *Tim Fitzsimmons*, Director, Research Finance Operations - NYU Langone Health; *Juliana Farinola*, Manager - NYU Langone Health; *Jamie Caldwell*, External Consultant, Interim Senior Director for Research Administration and Operations - University of Missouri-Columbia; *Meidy Candia-Leyva*, Assistant Controller - NYU
- Description: Certain award terms and conditions can pose significant administrative burdens and hurdles to implement successfully. This session will discuss best practices on how to manage these especially challenging award terms and conditions.
- **When: June 13, 2022 at 2:00pm - 3:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Ten

- Topic: "Audits - Current Landscape and How to Mitigate Risks of Findings"
- Presenter(s): *Jeremy Forsberg*, Assistant Vice President for Research - University of Texas at Arlington; *Zach Belton*, Senior Director - Huron Consulting Group
- Description: This session will focus on internal controls for all financial operations, beyond compensation compliance. This session will also touch on audit mitigation from those who have successfully conducted audits recently. This includes UG, HEERF, CARES, Export Controls, Foreign Engagements, COVID, F&A, GDPR, Research Data Management, Gift Compliance, etc.
- **When: June 17, 2022 at 12:00pm - 1:30pm**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Eleven

- Topic: "F&A Rate Agreement - Strategies to Consider"
- Presenter(s): *Wendy Meister*, Senior Director - Huron Consulting Group; *David Schultz*, Assistant Vice President, Sponsored Research Administration - University of Houston; *Chea Smith*, Director, Cost Analysis & Reporting at Rutgers, The State University of New Jersey

- Description: This session will focus on strategies for data collection, data analysis, site visits and more - regarding F&A rate calculation and negotiation.
- **When: July 26, 2022 at 12:00pm - 1:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Twelve

- Topic: "Connecting the Silos Instead of Breaking them Down: A Discussion about Connecting, Understanding, and Creating Partnerships."
- Presenter(s): *Sandy Fowler*, Assistant Dean, College of Agriculture and Life Sciences - University of Wisconsin-Madison; *Sunny Thompson*, Sr. Manager & Associate Director of Research Operations - UT Health San Antonio
- Description: We always hear about breaking down silos; how about trying to connect them instead? Institutions have varying organizational administrative structures; many are very siloed structures by design or by tradition. The silos that exist don't always connect well with sponsored project needs. Policies, rules, and regulations in partnering units can cause frustrations and be prohibitive to research ventures. How do we as research administrators connect the sponsored project management silo to other administrative unit silos so that research needs are met and not hindered? Attendees will share their experiences and ideas to try to answer that question.
- **When: August 22, 2022 at 2:00pm - 3:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Session Thirteen

- Topic: "CERA Research Grant Outcomes: Subrecipient Monitoring Internal Control Framework and Toolkit"
- Presenter(s): *Jeremy Forsberg*, Assistant Vice President - University of Texas at Arlington; *Roseann Luongo*, Manager - Huron Consulting Group; *Lisa Mosley*, Executive Director - Yale University; *David Ngo*, Assistant Vice President - New York University; *Gabby Labayen* - Manager, Huron Consulting Group
- Description: Universities, Research Institutes and Medical Centers have developed their own approach to monitoring and creating internal controls around sub-recipient awards. While every University has unique business needs and risk tolerance, there is a great deal of commonality across the required actions and controls for these activities. While resources exist to help standardize the approach, including the Harvard Toolkit, the FDP resources and the Huron Consulting Group Toolkit, CERA has developed its own set of resources that focus on minimizing administrative burden and thinking creatively about risk tolerance. The CERA research grant focuses on post award monitoring, as there are many more resources readily available for subaward issuance and stages prior (e.g. FDP subrecipient determination checklist). This session will review both the regulatory requirements surrounding sub-recipient monitoring, and the CERA developed tools that can be leveraged by members.
- **When: September 9, 2022 at 12:00pm - 1:30pm EDT**
- Where: New York University & NYU Langone Health are hosting – registrants will get a calendar invite with virtual Zoom webinar info.

Please RSVP for any RAD sessions via our [online registration](#).

Feel free to share this invitation broadly. All interested parties are welcome!

As a reminder, RAD was created due to the current economic pressures, where it has become increasingly difficult to identify the required resources to train research administrators and aid their professional development/career growth. The goal of RAD is to provide information/knowledge sharing for all research administrators. New research administrators could utilize RAD as part of their new employee on-boarding, while veteran research administrators could utilize RAD for their continued learning (or refresher).

All RAD sessions are taught by national level, expert presenters. All RAD sessions are free (\$0 cost).

For questions, more information, RSVP or calendar assistance - please email Sara Sheffer-Pryce (ssp3@nyu.edu). NYU can provide CEU/CPE or certificate of attendance/completion, for folks who need it (e.g. CRA continuing education). Please fill out our [CEU/CRA Request Form](#) and we will follow up with a certificate.

All prior RAD content from [The New School](#) (slides/videos held before October 2021) are still available.

Thanks!

Respectfully,

David Ngo, Assistant Vice President, Grants, Gifts and Investments Accounting & Compliance - New York University

and

Tracey Volz, Senior Director, Research Finance Operations - NYU Langone Health