

Welcome to the 38th CAURA National Conference and Annual General Meeting.

Our conference last year highlighted the significant amount of growth across many domains in research administration. This has continued over the past year and is reflected in the agenda for the 2009 conference; we continue to see increasingly complex and high profile programs being launched; there are new and challenging changes in research compliance and increased emphasis on differentiation and co-ordination in our partners in research. Over the past decade we have seen enormous growth in the professionals devoting themselves to the management of the research enterprise. The economic situation facing the country, however, is also being acutely felt in universities; and for many of us, this means fewer staff supporting a growing portfolio of activities. Now, more than ever, there is a need to benefit from the collective expertise within the association, the professionalism of our colleagues, and the experience of our membership. Each year your executive works towards improving the professional development opportunities, the opportunities to network, to engage, and to enhance the content of our annual conference; we hope this year does not disappoint. I wish you an informative, interesting and enjoyable few days here with us in Ottawa!

Sandra

Executive Committee 2008-2009

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Sandra Crocker
McGill University

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University of Manitoba

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Observers

CIHR
Dany Lafontaine

NSERC
Barbara Conway

CFI
Patrick Pilot

SSHRC
Christine Trauttmansdorff

AUCC
Dawn Jeffrey

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Saturday, May 23, 2009

Time	Program	Room
14:00 – 18:30	Registration	Governor General Foyer

Sunday, May 24, 2009

Time	Program	Room
7:30 – 17:00	Registration	Governor General Foyer
9:00 – 12:00	Standard Research Agreements	Governor General I
9:00 – 12:00	US National Institute of Health	Québec
9:00 – 12:00	Research Accounting I	Province I
9:00 – 17:00	New Administrators Workshop	Governor General II
10:15 – 10:45	Coffee Break	
12:00 – 13:30	New Administrators Lunch – Meet the Executive	Province II
12:00 – 13:30	Lunch - Workshop Attendees	Confederation III
13:30 – 17:00	Research Accounting II	Province I
13:30 – 17:00	Selecting the Best Standard Research Agreements	Québec
14:45 – 15:15	Coffee Break	
15:15 – 17:00	Knowledge Mobilization	Governor General I

Monday, May 25, 2009

Time	Program	Room
7:30 – 16:30	Registration	Governor General Foyer
8:00 – 16:00	Exhibition	Confederation Foyer
7:30 – 8:30	Breakfast	Confederation II
8:45 – 10:00	Plenary – Opening Session	Confederation I
10:00 – 10:30	Coffee Break	Confederation Foyer
10:30 – 12:00	Audit and Outcome Measurements	Confederation I
10:30 – 12:00	Momentum and the Drivers of Change	Province I
10:30 – 12:00	CIHR Updates	Governor General II
10:30 – 12:00	Canadian Grant Facilitation	Province II
12:00 – 13:30	Lunch and Awards	Confederation II
13:30 – 15:00	Outcome Measurement Study	Governor General II
13:30 – 15:00	Coordination and Management of Shared Portfolios	Confederation I
13:30 – 15:00	Getting the Word Out: Insights on Communicating the Value of Research	Province I
13:30 – 15:00	Interpreting Reviewers Comments	Province II
15:00 – 15:30	Coffee Break	Confederation Foyer
15:30 – 17:00	Update on Regulatory Issues	Governor General II
15:30 – 17:00	SSHRC Updates	Confederation I
15:30 – 17:00	Intellectual Property Insurance/Indemnification ACCT session	Province I
15:30 – 17:00	Tax Issues	Province II
18:00 – 19:00	Cocktail	Confederation Foyer
19:00 – 22:00	Dinner	Confederation II

Tuesday, May 26, 2009

Time	Program	Room
7:30 – 16:30	Registration	Governor General Foyer
7:30 – 8:30	Breakfast	Confederation II
8:00 – 16:00	Exhibition	Confederation Foyer
9:00 – 10:00	Plenary Session	Confederation I
10:00 – 10:30	Coffee Break	Confederation Foyer
10:30 – 12:00	Electronic Submissions	Province I
10:30 – 12:00	Some Approaches for Administering Waiver Requests and Internal Allocations	Governor General II
10:30 – 12:00	The Institutional Cost of Research: AUCC's Advocacy Efforts and the University Experience in Negotiating IDC rates with the US	Province II
10:30 – 12:00	NSERC New Initiatives and Updates	Confederation I
12:00 – 13:30	Lunch and Annual General Meeting	Confederation II
13:30 – 15:00	Research Ethics Boards	Province II
13:30 – 15:00	Managing your Staff Development in a Mixed (up) Environment	Confederation I
13:30 – 15:00	The Unknown – Working in a Small Office	Province I
13:30 – 17:00	Executive Forum	Nova Scotia
15:00 – 15:30	Coffee Break	Confederation Foyer
15:30 – 17:00	Institutional Measures of Success	Province I
15:30 – 17:00	Addressing Agency Objectives and Research Facilitation	Province II
15:30 – 17:00	CFI / CRC Program Update	Confederation I

Wednesday, May 27, 2009

Time	Program	Room
9:00 – 15:00	Project Management	Province II
9:00 – 15:00	Successful Research Proposals	Province I

Dan Chase Award

Named in memory of Dan Chase, who played an active role in the Association over a number of years, the Dan Chase Distinguished Service Award has been established to recognize CAURA members whose services have been of significant benefit to the entire organization. The award need not be made every year.



Lori Foster

Lori Foster has been in the field of research administration for more than 20 years. During that time Lori has been instrumental in numerous projects which have had a direct impact on furthering the goals of CAURA. Some of Lori's accomplishments include: developing and sharing best practices with institutions across Canada; developing programs to support excellence in grant development (including SSHRC mentoring workshops); and developing numerous recommendations regarding research administrative policies and processes.

Lori has a reputation for excellence within the University of Calgary and throughout CAURA as a 'go to' person offering advice and council focused on making the research administration experience the best possible. She is committed to service to the research community and recently led a project to integrate the administrative processes at the U of C. Through her years as a CAURA member (as well as serving as a member of the CAURA Executive) she has presented at numerous workshops and best practice sharing sessions. Lori has always conducted herself with grace, poise, and professionalism. She does not seek the limelight; rather she spends her time committed to providing service to her colleagues. Lori's calm, unflappable approach has been the bedrock upon which many challenges have been solved.

Saturday, May 23, 2009

14:00 – 18:30	Registration	Governor General Foyer
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Sunday, May 24, 2009

7:30 – 17:00	Registration	Foyer Governor General
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9:00 – 12:00	Standard Research Agreements	Governor General I
	Organizer: Barbara Crutchley, University of Manitoba	
	Speaker: Marcel Mongeon, Marcel Mongeon Consulting	
	Level: Intermediate / Advanced	

Small and medium sized institutions benefit from decision tools when developing expertise. The 5 Lambert Agreements in the UK are simplifying how contracts are negotiated between universities and industry. Based on the prior experience of the CHEF (Corporate-Higher Education Forum) agreements in Canada, these new model agreements could easily simplify the world of contract negotiation for individuals in multi-purposed offices as well as those needing a simplified decision process for choice of contract clauses. Presentation information will be available in both English and French.

9:00 – 12:00	US National Institutes of Health	Québec
	Organizer: Michael Owen, Ontario College of Art and Design	
	Speakers: Bill Schweri, University of Kentucky Michael Owen, Ontario College of Art and Design	
	Level: Intermediate	

Bill Schweri will highlight the process for developing applications to the US National Institutes of Health and identify best practices and pitfalls in grant preparation. Bill Schweri is Director of Federal Relations at University of Kentucky and has worked closely with faculty members to prepare research proposals to NIH. He has presented workshops on how to develop successful proposals for NIH at meetings of CAURA, the Association of Research Managers and Administrators (ARMA), the Danish Association of Research Managers and Administrators (DARMA), and the Australasian Research Managers Society (ARMS).

Sunday, May 24, 2009

9:00 – 12:00	Research Accounting I	Province I
	Organizer: L'naya Hindman, University of Ontario Institute of Technology	
	Speakers: Angela Zeno, York University Sandy Bligh, University of Victoria Laurie Chochinov, Carleton University	
	Level: Introductory / Intermediate	

The first hour of this workshop will cover the basics to introduce people that are new to research accounting to general processes/procedures. The remaining time will cover a discussion on a variety of issues likely to be encountered in typical (and not-so-typical) post-award scenarios. Topics will include items such as: what we need to know about HR and payroll; spending prior to official award confirmation and how to deal with this; acceptable documentation for tracking in-kind contributions, etc.

While this will be a presentation format, attendees will add to the session through their questions and shared experiences and time will be allocated for questions and answers throughout the session.

9:00 – 17:00	New Administrators Workshop	Governor General II
	Organizer: Barbara Crutchley, University of Manitoba	
	Speakers: Robert Dirstein, Ryerson University Mary-Margaret Klempa, McGill University	
	Level: Introductory	

This workshop focuses on the needs of individuals within their first 24 months of taking up a position in Research Administration. Discussion will cover many of the challenges facing us in this changing research environment as increased reporting and complexity of funding have made significant impact on how we do our work. We'll highlight the importance of understanding the role of the research administrator within the institutional, local, national and international funding environment and how you can be perceived as a resource to your institution's community. The presenters will impart the basics of the research administration responsibilities as well as sharing with you helpful experiences and "tricks of the trade".

10:15 – 10:45	Coffee Break	
12:00 – 13:30	New Administrators Lunch – Meet the Executive	Province II
12:00 – 13:30	Lunch - Workshop Attendees	Confederation III

Sunday, May 24, 2009

13:30 – 17:00	Research Accounting II	Province I
	Organizer: L'naya Hindman, University of Ontario Institute of Technology	
	Speakers: Deanne Babcock, University of Western Ontario Heather Pratt, University of Windsor Karen MacIntyre, Dalhousie University Deborah Zornes, Royal Roads	
	Level: Intermediate / Advanced	

Round table sessions with possible discussions about:

- CFI administration and monitoring visits
- Tri-council compliance and monitoring visits
- Working with auditors
- Year-end reporting of research dollars and COFO/CAUBO reporting
- How to train the researcher?
- How to work with other functional areas when we are ultimately accountable
- Expanding on the document imaging to include other forms of "the electronic world". For example, how do other universities deal with e-mail approvals, electronic signatures, EVIs (electronic vendor invoices), invoices printed off the internet instead of received via mail, proof of payment via internet (e.g. PayPal), scanning & e-mail of documents vs. faxing, dealing w/ tri-council's FDSR system, scanned financial reports (e.g. F300s printed directly from the accounting system)
- In-kind policy & procedures - what do other universities include as backup documentation for in-kind, are there other in-kind guidelines besides CFI?

The session will be divided into discussion groups and time will be allotted to each group to provide a summary of their discussion with the general group.

13:30 – 17:00	Selecting the Best Standard Research Agreements	Québec
	Organizer: Barbara Crutchley, University of Manitoba	
	Speaker: Marcel Mongeon, Mongeon Consulting Inc.	
	Level: Introductory / Intermediate	

In this workshop, participants will be involved in simulated contract reviews. Using examples from real-life (with appropriate changes made for anonymity) of research agreements, inter-institutional agreements, material transfer agreements and non-disclosure agreements, the session will suggest approaches to both reviewing such agreements as well as how to deal with those proposing unacceptable terms. This workshop assumes the participant will have some experience in actually having conducted such reviews in their own work and will be of benefit to both beginners and experienced persons alike. Presentation information will be available in both English and French.

14:45 – 15:15 **Coffee Break**

Sunday, May 24, 2009

15:15 – 17:00	Knowledge Mobilization as an Evolving Role for University Research	Governor General I
	Organizer: David Phipps, York University Speakers: Craig McNaughton, SSHRC David Yetman, Memorial University, Newfoundland & Labrador Michael Johnny, York University Fiona Haynes, University of Saskatchewan Laura Milne, University of Victoria Level: Introductory / Intermediate	

Increasingly funding programs require our faculty to work with non-academic stakeholders and develop knowledge mobilization strategies (i.e. CIHR PHSI, SSHRC CURA, SSHRC Clusters etc.). Our technology transfer offices help our faculty develop commercialization strategies for NSERC I2I and CIHR PoP but who will help them develop applications with a KM component – you, in all your free time? What does a KM Unit do? How can the KM Unit support faculty and students? How do you manage the expectations of faculty and research partners? Do funding agencies even care? In an interactive format (no talking heads!) university based knowledge brokers will share their KM tools and their KM stories.

Monday, May 25, 2009

7:30 – 16:30	Registration	Governor General Foyer
8:00 – 16:00	Exhibition	Confederation Foyer
7:30 – 8:30	Breakfast	Confederation II

8:45 – 10:00	Plenary – Opening Session	Confederation I
	Organizer: Sandra Crocker, McGill University	
	Speaker: Bob McDonald, Science Journalist	
	Level: All levels	

One of Canada's best known science journalists, Bob McDonald has been presenting the program *Quirks & Quarks* on CBC radio since 1992. He is also a weekly science commentator on *CBC Newsworld Morning*, and science correspondent for CBC TV's *The National*.

McDonald has been honored for his outstanding contribution to the promotion of science in Canada as the recipient of the Michael Smith Award from the Natural Sciences and Engineering Research Council, the Sir Sanford Fleming Medal from the Royal Canadian Institute and the McNeil Medal from The Royal Society of Canada. Bob McDonald has been awarded many honorary degrees - the most recent being an honorary Doctorate of Science from McMaster University in June, 2008.

10:00 – 10:30	Coffee Break	Confederation Foyer
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10:30 – 12:00	Audit and Outcome Measurements	Confederation I
	Organizer: L'naya Hindman, University of Ontario Institute of Technology	
	Speakers: Carole Crête-Robidoux, NSERC/SSHRC	
	Isabelle Beauvais, CIHR	
	Isabelle Henrie, CFI	
	Stéphane Leroux, CFI	
	Lynda Brulotte, University of Alberta	
	Daniel Lefebvre, University of Ottawa	
	Level: Intermediate / Advanced	

This session will be an opportunity to take a look at some audit and monitoring visits conducted by NSERC/SSHRC/CIHR and CFI in the past year. University reps will be asked to discuss some of their findings and how they are currently planning on handling compliance points. This session will be focused to help institutions better their policies and procedures and/or help them identify gaps in current practices.

Monday, May 25, 2009

10:30 – 12:00	Momentum and the Drivers of Change: What is Driving University Research and What is the Impact on your Office?	Province I
	Organizer: Dawn Jeffrey, AUCC	
	Speakers: Dawn Jeffrey, AUCC Martin Kirk, University of British Columbia	
	Level: Advanced	

An AUCC representative will discuss the drivers of change as outlined in *Momentum: The 2008 report on university research and knowledge mobilization*. In order to understand the dynamics of university R&D activities and investments, it is useful to consider the drivers of change that are likely to have a significant impact on university-based research in Canada and internationally in the decade ahead. The drivers of change as outlined in *Momentum* are as follows:

- 1) Recognition of the link between university R&D and national prosperity/quality of life;
- 2) Global race for research talent;
- 3) Growing complexity and costs of research;
- 4) Increased emphasis on measuring R&D impact; and
- 5) Strong impetus and desire to partner across boundaries.

In addition to the presentation delivered by an AUCC representative, panelists (2-3) could discuss how their institution is addressing the drivers of change and comment on the impact that these drivers of change are having on their institution's activities. Are there other drivers of change? What other drivers may be emerging on the horizon? How can universities better address the drivers of change in order to plan their R&D activities strategically, manage them proactively and deliver R&D activities in an effective manner?

10:30 – 12:00	CIHR Updates	Governor General II
	Organizer: Dany Lafontaine, CIHR	
	Speaker: Pierre Chartrand, Vice President, Research	
	Level: All levels	

This session will provide an update on CIHR activities, including funding programs and important changes to our policies and website. Furthermore, a Research Reporting System is being implemented to ensure that CIHR has systematic, high quality reports of the results of research it funds. As well, the implementation of many best practices for competition management will be presented. Finally, an update on upcoming projects will be presented.

Monday, May 25, 2009

10:30 – 12:00	Canadian Grant Facilitation: An Environmental Scan	Province II
	Organizer: Kristina Ohrvall, Concordia University	
	Speaker: Rich Sobel, PhD., CAPM, Genome Sciences Centre, BC Cancer Agency et al.	
	Level: Introductory / Intermediate	
<p>The topic of grant facilitation is a relative newcomer to the CAURA landscape and was first addressed at CAURA meetings in 2004. Along with the recent proliferation of facilitator positions in Canadian research settings, there has been a broad range of roles, qualifications and activities associated with 'grant facilitation'. In this session, Dr. Sobel will present results from a national survey undertaken to capture the current status of grant facilitation activities in Canada and provide an environmental scan of this evolving role. Distributed in spring/summer 2008, the survey collected key information about gender, location, training, experience, job titles, salaries and activities. Following the presentation, the panel will address issues raised by the survey data and talk about "where we go from here". Questions from the session attendees will also be entertained. If you are a grant facilitator, work with grant facilitators, or supervise or hire facilitators, then this session is for you!</p>		
12:30 – 14:00	Lunch and Awards	Confederation II

Monday, May 25, 2009

13:30 – 15:00	Outcome Measurement Study: Building Understanding	Governor General II
	Organizer: Patrick Pilot, CFI	
	Speakers: Janet Halliwell, J.E. Halliwell Associates Inc. Sara Swenson, Simon Fraser University Ghislaine Tremblay, CFI	
	Level: Introductory / Intermediate	

Three speakers will present the Outcome Measurement Study (OMS) from different perspectives: the review committee, the institution and the CFI.

The first presentation will examine the OMS through the lens of the review committee. It will explore the distinctive characteristics of a “meta” review of outcomes from a portfolio of CFI investments, the elements of a successful review visit from the perspective of the Expert Panel, and the challenges of interpreting institutional data and integrating the insights into a report. The second presentation, from the perspective of the institution, will identify the best practices in effectively managing the exercise to deliver the information necessary for the Expert Panel. Participants will also hear of ways the host institution can expect to benefit from the OMS. Next the CFI will cover the findings from the OMS to date and how they are translating into strengthened accountability and improved policy.

13:30 – 15:00	Effective Coordination and Management of Shared Portfolios within Advancement/Research/Finance Offices	Confederation I
	Organizer: David Harris, University of Saskatchewan	
	Speakers: Colin Nicolson, University of Manitoba Jim Traves, University of Saskatchewan Daniel Lefebvre, University of Ottawa	
	Level: Introduction	

This session will attempt to provide some effective approaches to better integrate the operations of such offices, that often find themselves working together on the administration of research projects.

13:30 – 15:00	Getting the word out: Insights on Communicating the Value of Research	Province I
	Organizer: Michael Owen, Ontario College of Art and Design	
	Speakers: Jennifer Grass, Council of Ontario Universities Michael Owen, Ontario College of Art and Design	
	Level: Intermediate	

A panel of communications experts will provide research managers and administrators with insights and strategies on effective ways to communicate the value of research and scholarship to the public, local to federal politicians and senior officials, and sponsors. The learning outcomes will allow research managers and administrators with an opportunity to assess what works and what does not and how to focus their message to the audience

Monday, May 25, 2009

13:30 – 15:00	Interpreting Reviewers Comments	Province II
	Organizer: Patricia Fournier, Université de Sherbrooke	
	Speakers: Terry Lee McPherson, SSHRC Eileen Jessop, NSERC	
	Level: Intermediate	

Speakers representing the various major granting councils (both program officers and grant selection committee members) will be on hand to speak to CAURA members about the constraints inherent in reviewer and committee comments and what is behind the simple sentences resulting from competition review.

15:00 – 15:30	Coffee Break	Confederation Foyer
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15:30 – 17:00	Update on Regulatory Issues: New Organisms, Controlled Goods Program and Environmental Assessment	Governor General II
	Organizer: Barbara Conway, NSERC	
	Speakers: Jim Louter, Environment Canada George Arvanitakis, Health Canada Lynne Sabatino, Foreign Affairs and International Trade Canada Dianne Fraser, NSERC	
	Level: Intermediate / Advanced	

Updates will be provided on proposed legislative changes impacting research involving new organisms, and the ongoing implementation of the Controlled Goods Program. The seven-year review of the Canadian Environmental Assessment Act and the process used by NSERC to ensure that the research it supports complies with this Act will be explained.

15 :30 – 17 :00	SSHRC Updates	Confederation I
	Organizer: Christine Trauttmansdorff, SSHRC	
	Speaker: Gisèle Yasmeeen, Vice-President, Partnerships	
	Level: All levels	

SSHRC is continuing to pursue the objectives included [Framing Our Direction](#) (SSHRC's strategic plan for 2008 to 2010), and will provide updates on progress over the past year. Topics will include selected program updates as well as information about SSHRC Leaders, knowledge mobilization, measuring impacts, the Blue Ribbon Panel on peer review, Budget 2009, and more.

Monday, May 25, 2009

15:30 – 17:00	Intellectual Property – Insurance/Indemnification ACCT session	Province I
	Organizer: Sandra Crocker, McGill University	
	Moderator: Janet Scholz, ACCT Canada	
	Speakers: Sean P. Flanigan, University of Ottawa Kevin Casement, UTI, Calgary	
	Level: Advanced	

“Just sign the agreement and no one will get hurt!” Or will they? An in depth look at the myriad of language in agreements that impact commercialization, intellectual property protection and knowledge transfer. Impact and risk assessment along with agreement language alternatives, alternative models of cooperation as well as negotiating tips will be discussed. Participants will be expected to have completed advanced reading in preparation for this workshop; this is an interactive session and case studies will be part of the session format. Focus of this workshop is towards senior research administrators who have been drafting and/or vetting agreements for several years.

15:30 – 17:00	Tax Issues	Province II
	Organizer: L'naya Hindman, University of Ontario Institute of Technology	
	Speakers: Ted Spevick, KPMG – Non Profit Organisation Tax Specialist Lesley Tela, KPMG – Commodity Tax Specialist	
	Level: Intermediate	

Representatives from KPMG LLP will provide answers to a myriad of questions related to the income and commodity tax implications of items such as research grants, funding, computation of income, use of home offices, travel expenses, taxable benefits and donations.

18:00 – 19:00	Reception	Confederation Foyer
19:00 – 22:00	Dinner	Confederation II

Tuesday, May 26, 2009

7:30 – 8:30	Breakfast	Confederation II
8:00 – 16:00	Exhibition	Confederation Foyer

9:00 – 10:00	Plenary Session: “I didn’t know I knew that”	Confederation I
	Organizer: Barbara Crutchley, University of Manitoba	
	Speaker: Marcel Mongeon, Mongeon Consulting	
	Level: All levels	

For a change of pace, drop your business card at the door and join our interactive game show called: “I didn’t know I knew that!” Win prizes!

For all levels of experience, we’ve set questions to be answered by randomly selected contestants who will be quizzed on several categories of research administration, including the general areas of: Grants Pre-award”; Contracts; Post-Award; Finance; and Wild Card. Whoever answers best and first will gain or lose points, with the highest final tally marking the winner.

Answers will be verified by our panel of experts. Join us in this light hearted look at our everyday challenges! You might even learn something new.

10:00 – 10:30	Coffee Break	Confederation Foyer
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10:30 – 12:00	Electronic Submissions	Province I
	Organizers: Dany Lafontaine, CIHR Barbara Conway, NSERC Christine Trauttmansdorff, SSHRC	
	Speakers: Evie Gray, CIHR Kalvin Mercer, SSHRC Eileen Jessop, NSERC	
	Level: Introductory / Intermediate	

The Tri-Council agencies (CIHR, NSERC, SSHRC) have been moving gradually towards an electronic mode for submission, evaluation and approval of funding applications. Each council will provide attendees with an update to prepare their research community properly prior to the next round of competitions.

NSERC & SSHRC will provide a demonstration of their Enterprise Award Management System (EAMS) proof of concept, as well as expand on their vision and objectives for the system. CIHR will provide information to the institutions now coming aboard the *eApproval* tool for the first time. Lessons learned on the *eServices* front, as well as best practices when using these tools will also be presented. Changes made to the Vanier funding programs and their implications will also be presented.

Tuesday, May 26, 2009

10:30 – 12:00	Research Overhead – Some Approaches for Administering Waiver Requests and Internal Allocations	Governor General II
	Organizer: David Harris, University of Saskatchewan Speakers: Joanne R. Lauzon, University of Ottawa Jody Rice Gallagher, Dalhousie University Barbara Crutchley, University of Manitoba Level: Introductory / Intermediate	

This session will present some best practices as to how some institutions approach requests to waive overhead. In addition, considering an environment which includes faculties, departments, centres, schools and institutes, internal allocation strategies and approaches will be shared.

10:30 – 12:00	The Institutional Costs of Research: AUCC's Advocacy Efforts and the University Experience in Negotiating IDC Rates with the U.S.	Province II
	Organizers: Michael Owen, Ontario College of Art and Design Dawn Jeffrey, AUCC Speakers: Dr. John Dingwall, AUCC Susan Wood, Queen's University Martin Kirk, University of British Columbia Level: Intermediate / Advanced	

Part one of this session will focus on indirect costs of research in Canadian universities. Dr. John Dingwall of the AUCC will address the advocacy initiatives of AUCC and other university representatives to increase the funding for indirect costs and to educate the Government of Canada on both the need for and justification of the proposed rate of 40% (of Total Direct Costs).

Part two of this session will be a practical discussion of how to negotiate IDC with US federal agencies. The experience of one or more Canadian universities will be highlighted.

10:30 – 12:00	NSERC New Initiatives and Updates	Confederation I
	Organizer: Barbara Conway, NSERC Speakers: Nigel Lloyd, Executive Vice-President Isabelle Blain, Research Grants and Scholarships Janet Walden, Vice-President, Research Partnerships Level: All levels	

A variety of topics will be covered. NSERC representatives will provide information on new initiatives, such as the Grant Selection Committee restructuring project, the intellectual property policy, the Research Partnerships Strategy and the review of the research integrity framework. As well, progress being made on the implementation of the Federal Government's S&T Strategy: Mobilizing Science and Technology to Canada's Advantage, and the impact of Budget 2009 will be discussed. Program Directors will be available for questions and discussion on NSERC related issues CAURA members are dealing with.

Tuesday, May 26, 2009

12:00 – 13:30 **Lunch and Annual General Meeting** Confederation II

13:30 – 15:00	Research Ethics Boards	Province II
	Organizer: Michael Owen, Ontario College of Art and Design	
	Speaker: Gilles Morier, University of Ottawa	
	Level: Introductory / Intermediate	

Within a rapidly changing environment and evolving regulatory frameworks (e.g., version 2 of the TCPS, Health Canada development of standards for REBs conducting clinical trials under Division 5, changing US Federal regulations), universities and their REBs work hard to provide high quality service to research faculty and graduate students. This informative and practical session will highlight the ways in which REBs may be organized to support the research enterprise, highlight the ethical and administrative issues confronting researchers and university administrators, and provide research ethics education to researchers and participants. Gilles Morier is Director, Research Grants and Ethics, University of Ottawa, and former President of the Canadian Association of University Research Ethics Boards.

13:30 – 15:00	Managing your Staff Development in a Mixed (up) Environment	Confederation I
	Organizer: Nancy McNeil, Simon Fraser University	
	Speakers: Sonya Dudka, Dalhousie University Deborah Collis, Memorial University Deborah Zornes, Royal Roads University David Phipps, York University	
	Level: Intermediate / Advanced	

The topic of mentoring staff is a challenge we all face on a daily basis. This panel will share their successes and woes on a variety of topics that include (but are not limited to) staff evaluations (formal; informal; union staff; non-union staff); staff retention through professional development; succession planning and mentorship; problem solving (groups; individual meetings; union staff; non-union staff); and collective agreements that require equality for all employees. Come prepared to share your stories with our panel.

Tuesday, May 26, 2009

13:30 – 15:00	The Unknown – Working in a Small Research Office	Province I
	Organizer: Sandra Crocker, McGill University	
	Moderator: Robert Dirstein, Ryerson University	
	Speakers: Lindsay Coolidge, University of Ontario Institute of Technology Sylvie Côté, Bishop's University Meigen Schmidt, University of Regina	
	Level: Intermediate / Senior	

As we know,
There are known knowns.
There are things we know we know.
We also know
There are known unknowns.
That is to say
We know there are some things
We do not know.
But there are also unknown unknowns,
The ones we don't know
We don't know.

Donald Rumsfeld, U. S. Department of Defense news briefing Feb. 12, 2002.

Could he have been speaking about working in a small research office? With so many things to know – Grants, Contracts, Payroll, Finance, IP and Tech Transfer, Statistics, Systems, Ethics, etc. etc. – how do you know that you know the things you need to know. Join us for a panel discussion on the essentials of working in a small office.

13:30 – 17:00	Executive Forum	Nova Scotia
	Organizer: Daniel Lefebvre, University of Ottawa	
	Level: Advanced	

Breakout one:

Succession Planning in Research Offices

Facilitator: Daniel Lefebvre, University of Ottawa

Breakout two:

Contingency Planning in Economic Difficult Times

Facilitator: Rachel Scarth, University of Victoria

Breakout three:

Co-PI's - Credit and Responsibility (what happens when they don't get along)

Facilitator: Dan Sinai, Director, Research Development & Services, University of Western Ontario

Breakout four:

Structures and Functions in Research Offices

Facilitator: Dr. Russell J. Boyd, PhD, Associate Vice-president, Dalhousie University

Tuesday, May 26, 2009

15:00 – 15:30	Coffee Break	Confederation Foyer
15:30 – 17:00	Institutional Measures of Success	Province I
	Organizer:	Martin Kirk, University of British Columbia
	Speakers:	Sharon Mortimer, Michael Smith Foundation for Health Research David Phipps, York University Jody Ciufu, Canadian Federation for the Humanities and Social Sciences
	Level:	Intermediate / Advanced

Institutional Measures of Success are important in 5 areas within in the research administration arena.

The first set of KPIs are **operational** of the type: How efficient is the research services operation (ie how long does it take to issue an ethics certificate or open a research account)?

The second set are to do with **comparative/competitiveness** eg How is our institution performing relative to other peer institutions in measures of NSERC/SSHRC/CIHR/CFI success or technology transfer and how can we do better?

The third set of measures relates to **strategic planning** ie how fast are we growing in certain areas and what new infrastructure will we need as a result?

The fourth area which has recently become very important is a measure of **research impact** and assessing the value of research?

The session will focus on the KPIs that are tracked as best practice and look into the future to develop appropriate outcome/output measures. The panel will give the perspectives of

- Best practice operational measures (ORS/VPRO) for the University
- Funding agency: Demonstration of ROI on research investment

Government view on research value and KPIs

Tuesday, May 26, 2009

15:30 – 17:00	Addressing Agency Objectives and Research Facilitation	Province II
	Organizer: Kristina Ohrvall, Concordia University	
	Moderator: Lyse Larose, Concordia University	
	Speakers: Wendy Ryan, NSERC Éric Bastien, SSHRC Jason Dyer, College for Interdisciplinary Studies, UBC	
	Level: Intermediate	

CAURA membership continues to look at the evolving position of “Research Facilitator” or “Research Development Officer”. This session will focus specifically on research facilitation in the context of addressing the specific objectives of funding programs as defined by the funding agencies. The responsibilities of a Research Facilitator (or equivalent position) often include proposal writing, reviewing of early stage proposal drafts, and discussion with researchers to enhance their research proposal, but do we always target the best suited program for the research proposal? In response to national funding priorities and needs, we are seeing new programs and new ways of funding. The role of a Research Facilitator is often also to advise researchers into which funding program is best suited for his or her research activities. How can Research Facilitators develop in-depth knowledge about the specific program objectives and communicate with the researcher(s) during the development process to ensure that their goals are consistent with the program objectives?

15:30 – 17:00	CFI / CRC Updates	Confederation I
	Organizer: Patrick Pilot, CFI	
	Speakers: Robert Davidson, Director, Programs, CFI Carmen Gervais, Senior Program Officer, CRC	
	Level: All levels	

This session will provide a brief update on the CFI's current Leading Edge and New Initiatives Fund competition. Recent modifications to the Leaders Opportunity Fund and activities for the up-coming year will also be discussed.

An overview of recent changes within the Canada Research Chairs Program will be presented. Topics such as the calculation process, the Chairs Toolbox, the management of equity standards, and the new directions and initiatives will be addressed.

The new Canada Excellence Research Chairs program will be profiled, including its application and review process. The Phase 1 results of the inaugural competition will be provided.

Wednesday, May 27, 2009

9:00 – 15:00	Project Management	Province II
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Organizer: Daniel Lefebvre, University of Ottawa
Speaker: Sunny Marche, Dalhousie University
Level: Intermediate/Advanced

As resources become scarcer and as accountability increases, management of research programs, funding, and projects has become increasingly important at universities and institutions. How do we achieve the best possible outcomes from research funding and research projects? This workshop will provide a framework for research management that can be used to assist researchers, make projects run more smoothly, and maximize productivity.

Dr. Sunny Marche is Professor in the School of Business Administration at Dalhousie University. He is currently Associate Dean in the Faculty of Graduate Studies. Dr. Marche holds a PhD from the London School of Economics and teaches IT Project Management. Prior to joining Dalhousie University, Dr. Marche had a long and successful career as a management consultant with extensive strategic planning experience with both large organizations such as TELUS and ATCO as well as small entrepreneurial companies. He has been the recipient of the Teaching Excellence Award in Management Education, MBA Professor of the Year and the A. Gordon Archibald Award in Teaching Excellence.

A working lunch will be served.

9:00 – 15:00	Successful Research Proposals: Start to Finish	Province I
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Organizer: Kristina Ohrvall, Concordia University
Speaker: Dr. Dawn McArthur, Child & Family Research Institute
Level: All levels

In this session, Dr. Dawn McArthur will present an intensive, interactive workshop on research proposal development that provides effective strategies and tools for developing competitive funding applications. The workshop is designed to be relevant to participants involved in research development and facilitation from all fields and experience levels. Dr. McArthur is Senior Research Development Facilitator in the Research & Technology Development Office at CFRI (Child & Family Research Institute - Vancouver).

A working lunch will be served.