

# Partnerships Work

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## **Saturday, May 8, 2010**

14:00 – 18:00      **Registration**

## **Sunday, May 9, 2010**

*“Workshops and Session”*

07:30 – 17:00      **Registration**

### **09:00 – 17:00      New Administrators Workshop**

Organizer:      Martin Kirk, University of British Columbia  
Speakers:      Robert Dirstein  
                         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".

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Sunday, May 9

09:00 – 12:00

## Workshop

### **Research Contracts and Agreements I**

Organizer: Martin Kirk, University of British Columbia  
Speakers: Barbara Muir, NSERC  
Alex Navarre, Numinor Conseil Inc.  
Level: Introductory

This workshop focuses on the issues encountered by practitioners in the field as they develop and process contractual arrangements and partnership grants with industry, governments, and foundations. The workshop will look at the types of contracts, checkpoints within the anatomy of a contract, pitfalls of contracts and risks involved. It will also introduce the skills needed to effectively interface with researchers, sponsors and administration, in a new environment that rewards industrial engagement and open innovation. You will learn how to add value to your contracts by drawing on your institution's array of other services. This session will also be an introduction to Research Contracts and Agreements II, which will provide a more in-depth legal perspective to contractual arrangements.

09:00 – 12:00

## Workshop

### **Research Accounting I**

Organizer: L'naya Hindman, CAURA  
Speakers: Sandy Bligh, University of Victoria  
Laurie Chochinov, Carleton University  
Angela Zeno, York University  
Level: Introductory

The first hour of this workshop will provide a basic introduction to the general processes/procedures within research finance for people new to research accounting. The remaining time will involve an interactive 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 the official award confirmation and how to deal with this; acceptable documentation for tracking in-kind contributions, compliance and reporting issues, etc.

Part of this workshop will be in a presentation format and attendees will add to the session through their questions and shared experiences. Significant time will be allocated throughout the session for questions, answers, and general discussion.

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**Sunday, May 9**

09:00 – 12:00      **Senior Executive Forum**      *Maximum: 36*

Organizer: Daniel Lefebvre, University of Ottawa  
Moderator: Sandra Crocker, McGill University  
Panellists: Russell J. Boyd, Dalhousie University  
Rachael Scarth, University of Victoria  
Greg Kealey, New Brunswick University  
Susan Blum, University of Saskatchewan

## **Institutions Strategies to Meet Growing Current Accountability in an Environment of Constrained Resources.**

This session will discuss efforts across units for maintaining responsiveness to faculties, senior administration, provincial and federal agencies as well as regulatory and legislative bodies, both domestic and international.

Four panels members from different institutions and of different size:

- Each panellist will present and discuss their strategy to meet growing current accountability in research management in an environment of constrained resources.
- There will be a question and answer period.

*This session is aimed at Senior Research Administrators (administrators with extensive experience in research management).*

10:15 – 10:45      **Coffee Break**

12:00 – 13:30      **New Administrators Lunch – Meet the Executive**

12:00 – 13:30      **Lunch – Workshop Attendees**

# Partnerships Work

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Sunday, May 9

13:30 – 17:00

## Workshop

### **Research Contracts and Agreements II**

Organizer: Martin Kirk, University of British Columbia  
Speaker: Neil Campbell, University of Calgary  
Level: Intermediate

This is a three part discussion of some of the most demanding issues emerging in the management of research contracts and agreements in a University environment. The program will begin with a general discussion of risk management, identifying the leading risks, determining how they can be prioritized and how this knowledge can impact workflow in a contracts management group. We will then dive into a case study in the negotiation of Intellectual Property rights, looking at the various needs and perspectives of industry sponsors and university researchers. The program will close with a fast paced discussion of several thorny issues that routinely come up in contract negotiation, with input from experts in different Universities.

13:30 – 17:00

## Workshop

### **Research Accounting II**

Organizer: L'naya Hindman, CAURA  
Speakers: Deanne Babcock, University of Western Ontario  
Deborah Zornes, Royal Roads University  
Level: Intermediate/Advanced

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

Round table sessions with possible discussions about:

- US A-133 Audits
- CFI Administration and monitoring visits
- Tri-council compliance and monitoring visits
- Mentoring and training staff in tough economic times
- Financial measures for research accountability

13:30 – 17:00

## Workshop

### **Grant Writing**

Organizer: Daniel Lefebvre, University of Ottawa  
Speaker: Larry McEnerney, University of Chicago  
Level: Intermediate

Do you receive the research funding and recognition you deserve? Does your grant application grab your reader's attention from the very first sentence? You are invited to this unique workshop, which will provide participants with a self-diagnostic tool to examine their own writing style as well as equip them with tools to take their writing skills to the next level.

This workshop will be taught by Larry McEnerney, Director of Writing Programs at the University of Chicago. He offers writing courses to students from the Graduate Divisions, the Graduate School of Business, the Law School, post-graduate institutes, and the undergraduate College. He works throughout the US and around the world as a consultant for writing to professional firms, universities, academic societies, businesses, and governments.

15:00 – 15:30

**Coffee Break**

# Partnerships Work

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**Monday, May 10, 2010**

**"Sessions"**

07:30 – 08:30      **Breakfast**

08:45 – 09:00      **Opening Remarks**

09:00 – 10:00      **Plenary Session**

Organizer:      Barbara Crutchley, University of Manitoba  
Speaker:        Dr. M. Elizabeth Cannon, PEng FCAE FRSC  
                      Dean, Schulich School of Engineering  
                      University of Calgary

"I connect with community and find the people who want to roll up their sleeves and be part of making an impact," Dr. Cannon says. "If people around the table have good ideas and can build a strong case for economic growth and social impact investments, great things will happen."

10:00 – 10:30      **Coffee Break**

10:30 – 12:00      **Look before you Leap (Aka Check in with your Technology Transfer Office before you Sign on that Dotted Line)**

Organizer:      David Phipps, York University  
Moderator:      Beverley Sheridan, Technology NOW  
Speakers:        Susan Wood, Queen's University  
                      Sophie A. Thériault, Three Oaks Innovations Inc. (UPEI)  
                      Martin Kirk, University of British Columbia  
                      Janet Sholz, ACCT Canada  
                      Neil Campbell, University of Calgary

Pre award folks work upstream creating university-industry obligations in programs such as NSERC CRD, OCE, CIHR PoP....they build the skeletons that may be in the closets when years later the researcher makes an invention disclosure to the tech transfer office. Using examples provided by our technology transfer colleagues this panel will pit pre award against post award and try to find not only the humour but also the truth in the myriad ways we can work more closely together. Can you yell "Jerry, Jerry, Jerry".....

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**Monday, May 10**

## 10:30 –12:00 **Science and Innovation Policy Matters**

Organizer: Martin Kirk, University of British Columbia  
Panellists: Janet E. Halliwell  
Lorne A. Babiuk, University of Alberta  
Iain Stewart, Dalhousie University  
Ted Hewitt, University of Western Ontario

The four speakers will explore recent developments in science and innovation policy, in Canada and internationally, with a focus on the implications for research funders, academic research performers and research administrators. The Panel has been structured to bring together speakers with distinctly different backgrounds and is designed to be provocative, with each member having been given license to challenge how we do business today. What might be discussed?? You will have to attend to discover. However, you might just hear about:

- o what changes in knowledge production/dissemination could mean for how things work
- o why the notion of national innovation systems is being challenged
- o why and how governments and universities think and act differently
- o discussion of how well universities are measuring up to expectations
- o why we have to do better at valuing the “harder” sciences (social sciences and humanities) contributions to innovation
- o going international – the benefits and pitfalls
- o overcoming tribal customs in innovative partnerships
- o why all of us have to measure better to measure up

## 10:30 –12:00 **Effective Interfacing Between Ethics Compliance and the Release of Research Funds**

Organizer: David Harris, University of Saskatchewan  
Speakers: Laurie Chochinov, Carleton University  
Daniel Lefebvre, University of Ottawa  
Lauralee Raffelsieper, Carleton University

Depending on a variety of factors including office structures and supporting research information systems, research administrators need to search for effective methods of expediting fund/account set-up for researchers, but to ensure their institutions remain compliant with all ethics policies and regulations. Furthermore, this is an important matter with respect to inter-institutional transfers and multi-year projects. A panel of administrators, representing institutions observed to have best practices in this area (based on the experiences of the tri-agencies), will share their approaches to the effective management of this process.

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**Monday, May 10**

10:30 –12:00

**CIHR**

Organizer: Greg Huyer, CIHR  
Speakers: Greg Huyer, CIHR  
Francine Leclair, CIHR  
Kristina Casey, CIHR

CIHR is at an exciting point in its mandate, celebrating its 10<sup>th</sup> anniversary in 2010. To help guide the organization forward, CIHR recently released its second five-year Strategic Plan – “Health Research Roadmap: Creating innovative research for better health and health care”. This Roadmap will enable CIHR to carry out its full mandate in all its complexity, show leadership within the wider health research community, and demonstrate accountability and results to the people of Canada. The key elements of the Roadmap, and how CIHR intends to implement them, will be highlighted. In addition, we will provide an overview of CIHR’s second international review, which will be conducted over the next year to assess CIHR’s progress in meeting its mandate.

We will also discuss CIHR’s ongoing collaborations with the other federal granting agencies, including program linkages between the agencies and the specific research areas covered by each agency’s mandate. Updates on CIHR’s funding programs will be provided, including partnership activities and international programs. Finally, there will be a discussion of CIHR’s procedures and business tools, including ResearchNet and the e-submission process, Common CV, and changes stemming from standardization of our internal business processes.

12:00 – 13:30

**Lunch and Awards**

13:30 – 15:00

**Writing Successful CFI Proposals:  
Enabling Researchers to  
Maximize their Chances of Success**

Organizer: Martin Kirk, University of British Columbia  
Speaker: Martin Butler, The Butlers and Associates

Martin Butler will lead a session focusing on how researchers and institutions can maximize their chances of submitting successful Canada Foundation for Innovation (CFI) proposals. Topics include: characteristics of successful applications; communicating to both expert and multidisciplinary review panels; managing application development and applicants; training, counseling and supporting researchers; CFI Myths and Concepts; building a translational research program, developing a training program, developing partnerships and collaborations, management models; and demystifying benefits to Canada and the mechanisms to realize return on investment.

The presentation will be followed by a question and answer session.

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**Monday, May 10**

**13:30 – 15:00    Make your Grant Money Go Further - Work with Industry Leveraged Funding Programs**

Organizer: David Phipps, York University  
Speakers: Dan Sinai, University of Western Ontario  
Barb Muir, NSERC  
Marc Castel, Ontario Centres of Excellence

Federal and provincial funding agencies are increasingly seeking to leverage industrial funds to derive maximum benefit to your university's research portfolio. These leveraged funds can support basic research, technology transfer and trainee opportunities. This session will feature perspectives from the research office as well as from the funders. Learn how to help your faculty get more money. Learn how to enhance the impact of your institution's research by working with industry. Learn what to do. Learn what not to do. Learn how to play nicely in each others' sand boxes.

**13:30 – 15:00    NIH and the Canadian Research Administrator**

Organizer: Michael Owen, University of Ontario Institute of Technology  
Speakers: Lorraine Deydey, University of Alberta  
Debbie Bilinski, University of Toronto

In this interactive session, you will learn about the experiences of two Canadian universities in managing NIH proposal development and post-award processes, including financial management and institutional assurances.

**13:30 – 15:00    Support for Faculty-based Knowledge Mobilization**

Organizer: David Phipps, York University  
Speakers: David Yetman, Memorial University  
Dominique Robitaille, Université du Québec à Montréal  
Michael Johnny, York University  
Fiona Haynes, University of Saskatchewan  
Joaquin Trapero, University of Victoria

Knowledge Mobilization is an emerging tool kit for research services. Similar to our technology transfer offices and UILOs knowledge mobilization can assist in the development and execution of partnership strategies that support large scale policy and practice relevant grant applications (mainly, but not exclusively from the social sciences and humanities). This session will feature videos of knowledge mobilization projects housed at Memorial, UQAM, York, U Saskatchewan and UVic. The videos will present the faculty perspective and the panel members will present the research and KM support service perspective.



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**Monday, May 10**

**15:30 – 17:00 CFI /CRC**

Organizer: Patrick Pilot, CFI  
Speakers: To be announced

CFI – update

The session will touch upon the programs to be launched or enhanced with the \$600M announced in the 2009 budget. In addition, changes in rules and policies will be discussed.

Canada Research Chairs – Update

The past year was a whirlwind of activity for the three programs housed at the Chairs secretariat. The Indirect Costs program has been audited and has completed its sixth-year summative evaluation. The Canada Research Chairs program is celebrating its 10th anniversary this year, has made some operational changes to improve the efficiency of its peer review process and is in the midst of an evaluation. Finally, the CERC program has completed its inaugural competition and has named the first round of Chairholders. This session will guide you through the labyrinth of changes, news and future activities being planned at the secretariat.

**18:15 – 19:00 Cocktail**

**19:00 – 22:00 Dinner**

# Partnerships Work

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**Tuesday, May 11, 2010**

**"Sessions"**

07:30 – 08:30      **Breakfast**

9:00 – 10:00      *Plenary Session*

**Everybody Stay Calm:  
Humour Habits for Thriving in Tough Times**

Organizer:      Sandra Crocker, McGill University

Speaker:        Paul Huschilt

In tough times, your people may be called on to work harder, smarter, better. But to be their best and do their best in the long term, they will need tools, techniques and strategies to stay well. 'Everybody Stay Calm: Seven Humour Habits for Thriving in Tough Times' teaches ways to work and live well when times demand more. Presented as part of Paul's signature 'low-budget spas', people will learn, laugh and remember simple things that are often overlooked - especially when stress levels are high. Celebrate, instruct, entertain, and teach your people so they can continue to produce much needed results in these challenging times.

10:00 – 10:30      **Coffee Break**

10:30 – 12:00      **Progress in Implementing the Tri-Council MOU –  
Challenges and Strategies**

Organizers:      Carole-Crête Robidoux, SSHRC

Gilles Morier, University of Ottawa

Speakers:        Gilles Morier, University of Ottawa

Martin Kirk, University of British Columbia

Bill McBlain, Alberta Health Authority

The Memorandum of Understanding (MOU) lays out the roles, responsibilities, expectations and accountabilities of granting agencies and institutions towards each other in the management of research supported by the Tri-Councils. Almost 10 years have passed since its original signature and two years since the addition of the second set of schedules. The goal of this session will be to discuss the impact that these MOUs have had on how universities manage their research activities, identify challenges that have been experienced, as well as success stories and critical success factors. With audience participation, we will also discuss the type of tools required to assure an integrated approach and how research managers make a business case for obtaining additional resources.

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**Tuesday, May 11**

## 10:30 – 12:00 **Asset Management**

Organizer: Sandy Bligh, University of Victoria  
Speakers: Christine Charbonneau, CFI  
Isabelle Henrie, CFI  
Mark Lagacé, CFI  
Dr. Jane Colwell, University of Guelph  
Teresa Mitrou, University of Victoria

Many agencies require that Institutions have sufficient funds and/or business plans in place to ensure the continued operations and maintenance of the major infrastructure projects which they have been awarded. Specifically, the responsibility for Institutions to have a plan or strategy for the provision (and administration) of operating and maintenance support has been included in the CFI Policy and Program Guide in November 2008.

In this session, CFI representatives will review the requirement and what the expectation is for Institutions. Representatives from 2 universities will be presenting what they currently use for their asset management system and how they anticipate being able to comply (or not) with respect to this requirement. Following the formal presentations the floor will be opened for a positive discussion and exchange of feedback around this topic.

## 10:30 – 12:00 **CAURA of Tomorrow**

Organizer: Barbara Crutchley, University of Manitoba  
Speakers: To be announced

Can we continue to use our current framework in the increased demands of an accountability environment? What responsibilities and who will CAURA membership represent? Will CAURA represent a specialized focus of interest (ie commercialization) or will we continue to broaden our audience by representing additional interests to: research accounting, compliance, hospital-university interface, facilitation, not to mention the pre-award support which is the bread and butter work of research administration?

## 10:30 – 12:00 **NSERC Update**

Organizer: Barbara Conway, NSERC  
Speakers: Isabelle Blain, NSERC  
Barbara Muir, NSERC

A variety of topics will be covered, focusing on the partnership theme. NSERC representatives will provide information on the new NSERC Strategy for Partnerships and Innovation and specific partnership initiatives, for example, Automotive Partnership Canada and Alternative Radiopharmaceuticals for Medical Imaging (Isotopes). They will also present the progress made on the implementation of the Federal Government's Science and Technology Strategy: *Mobilizing Science and Technology to Canada's Advantage*, on Tri-agency initiatives and the results of the recent grants and scholarships competitions.

# Partnerships Work

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**Tuesday, May 11**

12:00 – 13:30      **Lunch and AGM**

13:30 – 17:00      **Developing Effective Research Offices  
in Small Universities**

Organizer:      Michael Owen, University of Ontario Institute of Technology  
Speakers:      John Blackwell, St. Francis Xavier University  
                         Jennifer Freeman, University of Ontario Institute of Technology  
                         Jason Dyer, Kwantlen Polytechnic University

As the research funding environment becomes more competitive, research offices in smaller universities need to provide comprehensive and effective support to their faculty researchers while achieving institutional strategic plans and ensuring compliance with Tri-Council and other policies and procedures.

In this session, each speaker will reflect on her/his experience and discuss how Research Offices in small universities can meet the needs of faculty researchers and sponsors and the priorities of the university. Particular attention will address how research administrators can enable their researchers to be successful in national and international grant competitions.

13:30 – 17:00      **Managing the Credibility Challenge**

Organizer:      Kristina Ohrvall, Concordia University  
Speaker:        Dawn McArthur, Child and Family Research Institute

Building on last year's CAURA workshop on research facilitation, this full afternoon session will cover the role and credibility of the Research Facilitator in the day-to-day work. The Research Facilitator position comes in many shapes and forms and our credibility is based on perceptions of trustworthiness, reliability and integrity. How do we manage our credibility when we are both guarding the format of an application and the rules of the agencies while at the same time encourage researchers to be innovative and think outside the box?

Dawn McArthur, Senior Research Development Facilitator at the Child & Family Research Institute (CFRI) will lead the session and integrate useful information and tools with practical exercises. The session is designed to be relevant to participants involved in research development and facilitation from all fields.

13:30 – 15:00      **Growing our Own:  
Succession Planning at Memorial University**

Organizer:      Nancy McNeil, Simon Fraser University  
Speaker:        Lynn Best, Memorial University

The topic of staff development is a challenge we all face on a daily basis. During last year's topic "Managing Your Staff Development in a Mixed (Up) Environment" the issue of succession planning was raised. As our workforce ages and work force demographics shift, many institutions are concerned about having the right people with the right skills at the right time. This year we are pleased to provide a dedicated session for this topic. Ms. Lynn Best, Manager, Succession Planning, Memorial University will share Memorial's experience in implementing a succession plan with particular emphasis on successes and challenges.

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**Tuesday, May 11**

**13:30 – 15:00 SSHRC Updates**

Organizer: Carole Crête-Robidoux, SSHRC  
Speaker: Gisèle Yasmeen, SSHRC

SSHRC is continuing to pursue the objectives included in “Framing our Direction” and will provide updates on progress made over the last year. Most notably, SSHRC is in the midst of a comprehensive renewal of its program and organizational architecture. This process is intended to streamline the grant offering, modernize application systems and improve the overall efficiency of SSHRC processes. More information on this very important initiative will be provided during this session. Other topics will include selected program updates, information on the SSHRC Leaders, knowledge mobilization and program evaluation and measuring impacts.

15:00 – 15:30 **Coffee Break & Talk to the Executive**

**15:30 – 17:00 Making your Research Matter  
by Measuring Outcomes and Benefits**

Organizer: David Phipps, York University  
Speakers: Martin Kirk, University of British Columbia  
Wayne MacDonald, SSHRC  
David Baker, CASRAI

The research landscape is changing dramatically. Are our systems providing our support services with the proper supports? Additionally how can we address the challenges of the constant changes in our granting environment and the turnover of staff in a knowledge based world? Are we prepared to take on the responsibilities of an increased visibility on the international front? Your input will be welcome! Accountability. Metrics. You manage what you measure and what you measure matters...and other sayings that make us cringe. Do I measure my office, help my VP Research measure my institution, help SSHRC measure the benefits of its funding or help StatsCan measure the impact of Canadian research????? Most of us approach metrics with trepidation or at the very least view it as one more thing I have to do. This session will look at different perspectives of measuring impact using different examples from different perspectives: funder, university and association.

## Partnerships Work

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*Tuesday, May 11*

15:30 – 17:00 **Coordinating Activities Between Affiliate Hospital and University Research Administration Offices:  
Is the sandbox big enough for everyone?**

Organizers: Greg Huyer, CIHR  
Marie Townsend, McMaster University  
Speakers: Sameera Wazir, Vancouver Coastal Health Research Institute  
Rob McMaster, University of British Columbia  
Dori Kazimer, St Joseph's Health Care Hamilton

The research administration relationship between an affiliate hospital and its degree-granting institution can take on a number of forms. At one end of the continuum, the affiliate hospital has its own independent research administration office (RAO), functioning separately from that of the degree-granting institution. At the other extreme, the degree-granting institution's RAO provides all the administrative services for the affiliate hospital. A third model is an integrated or shared process, in which some responsibilities lie with the affiliate hospital and others are assumed by the degree-granting institution. This session will explore these three models, and provide perspectives from RAOs that represent each of the three approaches. The pros and cons of each model will be discussed, including when it might be appropriate for an affiliate hospital to consider changing from one model to another, and what the challenges and opportunities are with respect to each.

# Partnerships Work

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**Wednesday, May 12, 2010**

**“Workshops and Sessions”**

**Breakfast on own**

**09:00 – 15:30** **Workshop** *Maximum: 40*  
**Project Management**

Organizer: Daniel Lefebvre, University of Ottawa  
Speakers: Daniel Lefebvre, University of Ottawa  
Anne Tyrnie, University of Calgary  
Level: Intermediate/Advanced

The secret of project management is that it is all about relationships. Without good relationships nothing happens effectively. So - how do you nurture relationships with people - stakeholders, researchers, clients, teams...? How do you start them, maintain them, grow them? This is the greatest single success factor. The other relationships necessary in project management are your relationship to time (keeping balance), your relationship to software (keeping track of what comes next), your relationship to the goals and objectives of the project. The deeper relationship to what is success.

This is not project management 101, this is about what is really behind project management.

**You will learn:**

- The principles of project management
- An understanding of project management in a research environment
- The pathways from research idea to successful proposal submission
- How to build teams
- How to run a meeting effectively
- How to manage researchers
- The difference between strategy and tactics
- The difference between real and apparent control

A working lunch will be served.

**09:00 – 12:00** **Workshop** *Maximum: 40*  
**Future Trends:  
Managing Research in a World of Change**

Organizer: Martin Kirk, University of British Columbia  
Speaker: Martin Butler, The Butlers & Associates  
Level: Intermediate/Advanced

Martin Butler will lead a workshop on how future trends will change the culture of research from academic, government and business perspectives. Trends include: AUCC's 5 global drivers of change, federal innovation policy direction, researchers as social entrepreneurs, faculty recognition changes, a renewed role for basic research, a renewed role of for the Arts, Humanities and Social Science, a scenario for "Research in Canada" in 2022 and opportunities for CAURA members to take leadership roles in facilitating institutional change.

The presentation will be followed by a discussion. Bring an open mind and a passion for research. The Butlers & Associates is a partnership providing advice, mentoring, facilitation and writing services to researchers, institutions, agencies and industry. Since 1996, Martin Butler has impacted over 2,000 researchers from all 10 Canadian provinces, Europe, Asia, Africa, Australia and the United States, and has contributed to the writing of grant applications totaling over \$1B.

# Partnerships Work

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Wednesday, May 12

09:00 – 10:15

## **Data Plumbing – Hands On with CASRAI Standards**

*Maximum: 40*

Organizer: Janet E. Halliwell  
Speakers: David Baker, CASRAI  
Gord McDonald, Process Pathways

Conducting and administering research today is an increasingly multi-stakeholder and multi-disciplinary endeavour. The stakeholders include the highly qualified personnel doing the actual research (researchers and students) and the organizations that facilitate and support the research (universities, colleges and funding agencies). This 'ecosystem' of independent but collaborating stakeholders depends on an increasingly fragmented, duplicative and complex set of data about research personnel and activities. Recording, maintaining, analyzing and sharing this data is difficult and places a tremendous administrative burden on researchers and Research Services Offices. This results in valuable research time being spent on repetitive administrative tasks and valuable data being left untapped and underutilized.

This session will introduce you to the contents of the three primary data profiles in the CASRAI portfolio and their potential importance in facilitating research administration: Research Personnel, Research Activity and Research Outcomes & Benefits. We will also offer a sneak peek at the fourth major pillar in our data standards: a Research Classification Taxonomy. The session will also demonstrate how the standards can be used to reduce duplication in web-forms and simplify data-reuse and sharing.

09:00 – 12:00

## **Business Systems Review**

Organizer: Martin Kirk, University of British Columbia  
Speakers: Neil Taylor, University of Alberta  
Robert Dirstein, Dirstein Consulting

The research funding landscape has become much more complex both in terms of the diversity of funding programs but also because of ever increasing thresholds of research compliance. Tracking the research funding and research compliance activities to assure compliance but also to prepare for funder audits requires the support of a sophisticated business system. Institutions have taken many approaches to developing appropriate systems. Unfortunately there are few commercial systems available and the ones that exist are not ideal. Many institutions have developed custom systems. The investment involved can be huge.

Carrying out the business analysis to understand the system needs, developing scope of work documents to define the system needs, developing the business case required to secure the funding and then actually developing the system is a long and risky process.

This session will explore the process from start to finish and allow panelists who have developed systems to share experiences and best practice with peers who may be contemplating building or replacing a current system.

# Partnerships Work

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Wednesday, May 12

09:00 – 12:00 **Tri-Agency**

Organizers: Carole Crête-Robidoux, SSHRC  
Barbara Conway, NSERC  
Speakers: Carole Crête-Robidoux, SSHRC  
Barbara Conway, NSERC

This session will be divided in two parts: 1) Update on tri-agency initiatives, for example, the Tri-Agency Memorandum of Understanding and related policies, activities of Tri-Agency working groups and 2) A "Question and Answer" period during which representatives from the granting agencies will discuss various topics to be identified by CAURA membership through a quick communication in advance of the conference. This could include the on-line services for the submission of applications, financial pre- and post-award issues, and other topics of interest.

10:15 – 10:30 **Coffee Break**

10:30 – 12:00 **Canadian Space Agency:  
The Next Generation of Policy and Programs**

Organizer: Janet E. Halliwell  
Speakers: David Kendall, Canadian Space Agency  
Renée Elio, University of Alberta

There are changes afoot at the Canadian Space Agency (CSA) that will affect all universities involved in Space Science (science "on, from and in" space). Dave Kendall – responsible for capacity development at CSA – will speak to emerging strategic directions for the Agency and the new approach to funding research. CSA is moving to more extensive use of grants and contributions rather than contracts, and will be introducing a suite of new program initiatives over the coming months. Of particular interest to CSA are initiatives, including new infrastructure, that will foster capacity development and allow rapid and cost effective access to space for researchers and research training. Renée Elio, Associate Vice-President Research, and member of the Senior Space Science Advisory Committee to CSA, will speak to the institutional issues involved in promoting and supporting space research.