



# Fabulous at 40!

40<sup>th</sup> Annual Conference of CAURA  
Preliminary Program

## *Saturday, May 14, 2011*

14:00 – 18:00      **Registration**

## *Sunday, May 15, 2011*

07:30 – 17:00      **Registration**

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

Speakers:      Robert Dirstein, Dirstein Consulting  
Mary-Margaret Klempa, McGill University

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 15

09:00 – 17:00

## Workshop

### Successful Research Funding Proposal: Start to Finish

Speaker: Dawn McArthur, Child and Family Research Institute

This cohesive workshop will tackle key issues and provide tools, approaches and strategies to address the challenging “Start to Finish” of successful research funding proposals. Targeting both beginners and more experienced individuals, it is designed to help participants acquire strategies, tools and hands-on practice for developing competitive funding proposals.

The workshop addresses central aspects of research proposal development, including understanding RFAs; developing ideas, research plans and budgets; and crafting a competitive proposal.

Major topics include:

- Planning to Apply — Laying the groundwork
- Mapping the Proposal — Finding the framework & developing the plan
- Drafting the Proposal — Finding the superstructure & translating to text
- Refining the Proposal — Reviewing, reworking, crafting the style, finalizing

09:00 – 12:00

## Workshop

### Research Finance (Introduction)

Speakers: Sandy Bligh, University of Victoria  
Laurie Chochinov, Carleton University  
Angela Zeno, York University

The first hour of this workshop will provide an introduction to the general processes/procedures within a central research finance department for people new to this area. The remaining time will involve an interactive session on a variety of issues likely to be encountered in typical (and so 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 a general discussion.

Registered attendees will be emailed prior to the workshop to have the opportunity to submit questions and topics that they would like covered during the workshop discussion related to Research Finance.

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Sunday, May 15

09:00 – 12:00

Workshop

**Research Contracts and Partnership Agreements (Introduction)**

Speaker: Alex Navarre, Numinor Conseil Inc.  
Tanya G. Théberge, McGill University

This workshop focuses on 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. Intellectual Property policies as they relate to agreements, including implications of government policies e.g. NSERC, will be covered. The course will incorporate short illustrative cases to be discussed as part of the learning process.

Finally, 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, a necessary dimension for research administration professionals.

10:00 – 16:00

Seminar

Maximum: 30

**Strategic Planning & Innovation  
within University Research Centres**

Speaker: Gregory Vit, McGill University

The following learning objectives guide this Strategy and Innovation Seminar.

Participants of this course will:

- 1) Develop basic skills in Strategic Analysis
- 2) Understand the diverse contexts and configurations within which their organizations exist
- 3) Apply strategy theory to their real world of strategy and strategic problems
- 4) Examine Design Rules to promote Innovation within their departments and centres
- 5) Improve their analytical, synthesis and communication skills
- 6) Familiarize themselves with salient and contemporary issues and developments related to Strategy and Innovation

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

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

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

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*Sunday, May 15*

13:30 – 17:00

Workshop

**Research Contracts and Partnership Agreements  
(Intermediate)**

Speaker: Neil Campbell, University of Calgary

This session will build on the information presented in the introductory Research Contracts and Partnership Agreements I workshop. It is intended to be an intensive investigation of some of the most challenging legal issues emerging in the management of research agreements in a university environment. The program will involve an expert panel which will tackle a case study followed by a fast paced discussion of several thorny issues that routinely come up in contract negotiation.

13:30 – 17:00

Workshop

**Research Finance (Intermediate)**

Speakers: Deanne Babcock, University of Western Ontario  
Caroline Lachance, Université de Montréal  
Deborah Zornes, Royal Roads University

This session will be divided into small discussion groups and participants will have an opportunity to join the discussion of two listed topics during the workshop. Time will be allotted at the end of the workshop for each group to provide a summary of discussions with the larger group.

Discussion topics will include:

- CFI Administration
- Tri-council compliance and monitoring visits
- Sharing of federal indirect costs with affiliated hospitals
- How to manage doing it all (a focus on smaller institutions)

15:00 – 15:30

**Coffee Break**

18:00

**Welcome Reception**

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*Monday, May 16, 2011*

07:30 – 08:30      **Breakfast**

08:55 – 09:00      **Opening Remarks**

09:00 – 10:00      *Plenary Session*  
**Dealing with the Boiled Frogs:  
It's all about Workloads**

Speaker:      Linda Duxbury, Carleton University

Many employers implement family friendly policies such as flextime and compressed work weeks – but do not get the desired results. This talk focuses on the reason why many of the family friendly practices just do not seem to work – they are implemented into a culture which focuses on hours of work not output: where “presenteeism” is equated with productivity. This talk begins with an examination of why employee workloads, especially at the managerial and professional level, have increased over the past several decades. It then presents evidence on why employers should care – the impact of high workloads on the employer’s bottom line. The talk ends with a number of suggestions on how workloads can be decreased – without hiring more staff.

10:00 – 10:30      **Coffee Break**

10:30 – 12:00      **Surviving Audits**

Speakers:      Sandy Bligh, University of Victoria  
                     Martin Kirk, University of British Columbia  
                     Mary Kate Needler, Capital District Health Authority

The research environment has continued to become increasingly burdened with regulatory audits, varying in purpose and nature. In addition, it is becoming more common for funding agencies to design and implement program evaluations and assessments. Research institutions are devoting significant resources and energy to better understand requirements, prepare for such processes, and ultimately act on findings or recommendations.

This panel of speakers shall share some of their extensive expertise in three very distinct areas of research administration: (1) in the health area, conducting internal quality audits of research studies assessing compliance with research quality standards and facilitating regulatory inspections (Health Canada) of clinical trials, (2) within the financial area, preparing for, supporting and experiencing U.S. National Institutes of Health (NIH) financial audits, and (3) in the area of Canada Foundation of Innovation (CFI) funding, preparing for and working through a CFI Outcomes Measurement Study (OMS).

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## Monday, May 16

### 10:30 –12:00 **Internal Peer Review Processes**

Speakers: Danika Goosney, CIHR  
Gerry Johnston, Dalhousie University  
Christy McTait, University of British Columbia  
Rebbie Pamintuan, Hospital for Sick Children

Can peer review of a grant before it leaves the institution play a role in increasing researcher success rates? What motivates the researcher, the reviewer and the institution to participate in peer review? What role can technology play in facilitating the peer review process? Join our group of panelists as we discuss principles and models of peer review, share savvy tips for writing applications and learn from the experiences of institutions with established internal review processes as well as those who are learning from early experiences.

### 10:30 –12:00 **S&T Strategy – How Has it Affected Us?**

Speakers: Christiane Fox, Industry Canada  
Judy Fredenberg, University of Montana  
Janet Halliwell, J.E. Halliwell and Associates Inc.

Innovation policy in Canada has led to a dramatic growth of research activity in the University system since 1995. A large number of new funding programs eg CFI, CRC, Genome , CECR, Canada Excellence chairs, and business led NCEs have created a very productive period for the university research community. Recently, the innovation strategy has increased the emphasis on enabling partnership with industry. Christiane Fox from Industry Canada will provide an update on the latest direction of Canadian Innovation policy and how this is likely to influence the research strategy and research funding environment of the University and College research community. Christiane will also discuss the mandate of the R+D review which has been in progress since October 2010. Janet Halliwell, who has been an observer of, and administrator for, the evolving federal funding policies since 1977 (!) will provide her personal perspectives on what seems to be working well and where there is still work to be done on federal strategy and policy in light of new horizons and thinking on academic R&D.

### 10:30 –12:00 **Prizes, Honours and Awards - Creating a Culture that Leads to Success**

Speakers: Meredith Chatman, McGill University  
Lorna Very, University of Calgary

Prizes and Awards Specialists are positions which are emerging in various offices across the country at universities. One critical measure of the quality of scholarship and related activities at universities depends upon the number of university faculty who have been recognized by their peers with appropriate prizes, honours, and awards. Consequently, it is important to create a culture where colleagues are nominated for such awards. Distinctions received by researchers, scholars, teachers and staff reflect positively on the individual, as well as the institution.

In this interactive session, you will learn about the experiences of two Canadian universities in establishing and managing the prizes and awards portfolio. Learn about the processes they have established to support nominations that lead to success.

### 12:00 – 13:30 **Lunch and Awards**

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*Monday, May 16*

## 13:30 – 15:00 **Controlled Goods**

Speakers: Janet Newton, York University  
David Phipps, York University

Does worrying about things that blow up keep you up at night? Ever get spaced out about things that go into space? Well you need to know that the Controlled Goods Program of the federal government is here to make sure that you know what is about to blow up or go into space (or both) on your campus. And we are here to help. As the Designated Official of the Controlled Goods program for York University and the staff person who administers the program we routinely screen researchers, students and staff, inspect facilities, review security plans all in the name of security for Crown and Country. We will give you our screening forms and walk you through them. We will give you the mandatory information session we give faculty every year. We will give you our security plans so you can use what makes sense in your own institution. All this will help you understand, demystify and help you manage controlled goods on your campus. No federal employees. No policy directives. Just us and our forms.

## 13:30 – 15:00 **CFI / CRC Update**

Speakers: Carmen Gervais, CRC  
Guy Levesque, CFI

This session will provide a brief update of the activities of both the Canada Research Chairs program and the Canada Foundation for Innovation.

Key findings of the tenth year evaluation of the Canada Research Chairs program will be presented as well as the management response to the recommendations.

The CFI will present a brief update on the new CFI program architecture with a particular emphasis on the new \$600M to be allocated to the Major Science Initiatives Program, the College-Industry Innovation Fund, the Leading Edge / New Initiatives Funds and the Leaders Opportunity Fund.

## 13:30 – 15:00 **Measuring Research Outcome**

Moderator: Herb O'Heron, Association of Universities and Colleges of Canada  
Speakers: Alison Buchan, University of Toronto  
Barney Laciak, NSERC  
Wayne MacDonald, SSHRC  
Ghislaine Tremblay, CFI

The pressure is on for all of us to report on the value of research money that is dispersed to our agencies, NGOs, and to universities. What are organizations doing to demonstrate how hard research dollars are working for Canadians? What tools are used to measure research outcomes and what are the limitations of the current methods? Are there new and better methods on the horizon? Come learn about the granting agency and non-governmental perspective as well as the view from one of Canada's large research intensive universities on the challenges and opportunities surrounding the measurement of research outcomes.

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*Monday, May 16*

## 13:30 – 15:00 **Harmonization: Systems, Processes & Info-standards**

Moderator: Janet E. Halliwell, J.E. Halliwell Associates Inc.

Speakers: David Baker, CASRAI  
Kristina Casey, Canadian Common CV  
Martin Kirk, University of British Columbia  
Mark Roman, CANARIE

University Administrators deal with many different business processes in their daily work, frequently using a number of supporting software systems. These systems handle various types of information (data) throughout the life-cycle of each process. Our experiences with these processes, systems and information-sets could benefit from harmonization within the research community. We need innovative ways to improve the efficiency of our processes through increased commonality and sharing of best practices across all institutions. This session will explore opportunities for reduced burden on researchers, cost-savings and improved functionality for research administrators through the sharing of common IT systems, and adopting open info-standards for all the data that we produce, process and exchange. We will present current success stories and explore ways for our community to achieve even higher levels of harmonization.

## 15:00 – 15:30 **Coffee Break**

## 15:30 – 17:00 **Engaging Industry**

Speakers: Sean Flanigan, University of Ottawa  
Karina McInnes, Queens University  
Janet Scholz, ACCT Canada

Learn about industry perceptions of working with universities (faculty and administration); contrast and compare expectations and realities as related to each the university researchers/administrators and industry; propose ways of overcoming conflicting expectations and realities; propose ways to expand and develop relations with industry related to research administrators helping faculty promote and leverage research funding opportunities.

## 15:30 – 17:00 **Talent, Insight and Connection – SSHRC's Renewed Program Architecture**

Speaker: Adèle Savoie, SSHRC

By renewing its program architecture, SSHRC is creating a simpler, more flexible and effective system of application and assessment in the context of the changing research landscape and the increasing demand for social sciences and humanities research and training in all sectors of society.

This session will provide information on the current status of the implementation of SSHRC's new funding opportunities, plans for the continued implementation of the renewed program architecture and an opportunity for participants to share their views and provide feedback to SSHRC on this important initiative.

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*Monday, May 16*

## 15:30 – 17:00 **CFI – Items Involving In-Kind Contributions**

Speakers: Christine Charbonneau, CFI  
Wendy McCallum, University of Western Ontario

The CFI usually provides funding to a maximum of 40 percent of the total eligible costs of the infrastructure projects it supports. The remainder must be provided by the institution(s) and/or eligible funding partners. To this effect, in-kind contributions from suppliers are eligible.

It is the institution's responsibility to ensure that the fair market value reported to the CFI for items involving in-kind contributions is reasonable. The valuation of these items is complex and can be challenging. Institutions are also responsible for ensuring fairness and integrity in their purchasing processes.

In the past years, in-kind contributions have become more prevalent, and some challenges have been reported that need to be addressed. In consultation with CAURA and CAUBO, the CFI is currently reviewing existing guidelines. Changes are likely to take effect in the Fall of 2011. This session will provide an opportunity for participants to learn more about the proposed changes and provide feedback to the CFI.

## 15:30 – 17:00 **Implementation of Large Scale Construction Projects**

Speakers: Robert Hanlon, Ottawa Hospital Research Institute  
Mark Lagacé, CFI  
Derek Newton, University of Western Ontario

This session will examine the challenges associated with large-scale construction projects from concept to completion with an emphasis on best practices and lessons learned. Panelists will discuss the need for coordination between various institutional units involved in such large undertakings and good communication with funding agencies. The importance of involving all stakeholders even prior to securing funding cannot be overstated. Once projects get the green light but before the construction portion gets underway, the project management aspects of these large undertakings are challenging and the research office can play a pivotal role in tying up loose ends. Panelists will also provide insights on processes they follow to manage project effectively while ensuring compliance with funding agency and institutional requirements. Following brief presentations, the floor will be open for questions and discussions on best practices and lessons learned.

18:15 – 19:00 **Cocktails**

19:00 – 22:00 **Dinner**

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*Tuesday, May 17, 2011*

07:30 – 08:30      **Breakfast**

9:00 – 10:00      *Plenary Session*  
**Stump the Panel**

Panellists:      Barbara Crutchley, University of Manitoba  
Bob Dirstein, Dirstein and Associates  
Daniel Lefebvre, University of Ottawa  
Kathy Lylyk, Kwantlen Polytechnic University  
David Phipps, York University  
Katherine Schultz, University of Prince Edward Island

Here's your chance to look into your future in research services and wonder if you made the right choice - do you really want to become a Director? This audience participation game show will give you the chance to stump a panel of research service directors. Think of the hardest question to ask the panel. If you stump the panel you get a prize. The person with the most prizes wins the ultimate CAURA prize. Questions may be in French or English, must actually have an answer and must be related to research services (ie please don't ask us about fractal calculus). We may not have forgotten more than you'll ever learn but we've certainly forgotten enough to make this fun!

10:00 – 10:30      **Coffee Break**

10:30 – 12:00      **Risk Is (now) our Business-**  
**the Art of Risk Management for Research**

Speakers:      Greg Carreau, Manager with Environment Canada  
John Lammey, University of Ottawa  
Gilles Morier, University of Ottawa

Do you talk to your institution's Office of Risk Management? If you don't, you will soon. Risk Management, in all forms, is rapidly becoming an institutional priority right across the country. As you well know, researchers entertain some of the largest potential risks in any university operation. Don't wait for an institutional risk audit of your office that begins with 'OMG'... Come and discuss current issues with a research office director and risk manager who have grappled with the problems, and find out what new compliance areas (that you'll have to respond to) are coming down the pipe from Ottawa.

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*Tuesday, May 17*

## 10:30 – 12:00 **Research Communications – Digging for the Story**

Speakers: Mary Anne Beaudette, PARTEQ Innovations  
Carole Brabant, Concordia University  
Tim Lougheed, Freelance Science and Technology Writer

Because of their closer interactions with researchers and their more intimate knowledge of research projects, research offices are increasingly being asked to actively participate in communication activities. Often RSO staff does not feel adequately equipped to address those challenges or to identify projects that would be of value to communication units. This session will give the audience a chance to exchange with panelists of different backgrounds that have tackled some of these challenges.

This session will present the point of view of a research administrator, a director of communications and an external scientific writer. Together they will discuss best practices and lessons learned relating to collaborative projects between RSOs and communication units.

A large portion of the session will be dedicated to exchanges between panelists and the audience on success stories and challenges faced in relation to such collaborations.

## 10:30 – 12:00 **NSERC Update**

Speakers: Isabelle Blain, NSERC  
Margaret McCuaig-Johnston, NSERC  
Janet Walden, NSERC

A variety of topics will be covered in this session, with a focus on recent activities at NSERC. Representatives from NSERC will provide information on new initiatives that have been launched over the last year. For example, the NSERC Frontiers initiatives, College and Community Innovation programs, and Strategy for Partnerships and Innovation. NSERC representatives will also update session participants on the new target areas developed in 2010 for NSERC's strategic programs, and on the Discovery Grants competition results.

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*Tuesday, May 17*

10:30 – 12:00

## **Understanding Operational Costs of Research at Institutions**

Speakers: Beth Savan, University of Toronto  
Ron Swail, University of Toronto

The operating costs of scholarly research form a significant percentage of the total utilities costs of universities, given that laboratory buildings in particular are the most intense energy and water consumers per square meter on campus. Facilities staff is, however, constrained in managing these costs as universities strive to attract more research funding and raise their research profiles, and there is often little incentive for researchers themselves to consider the operating costs and resource consumption required by their research activities. We at the University of Toronto are making some headway with this issue and will share information on our recent initiatives. We are also eager to collaborate with our counterparts at other universities to identify opportunities to reduce these costs and emissions without, of course, constraining the nature of the research questions being asked, or the number of investigators engaged in research. We plan to invite discussion to explore further ideas for individually and collectively reducing the environmental and financial costs associated with scholarly research.

12:00 – 13:30

## **Lunch and AGM**

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*Tuesday, May 17*

## 13:30 – 15:00      **Emerging Institutions**

Speakers:      Mark Hoddenbagh, Algonquin College  
                     Robert Luke, George Brown College

The aim of this session is to provide a general understanding of how emerging research institutions are developing their vision, mission, goals, infrastructure and support systems (human resources and physical). Our objective is that participants will leave the session with sufficient knowledge to inspire their researchers and/or research teams to initiate the dialogue, share information and/or resources and develop strong ties with emerging institutions where their joint research efforts can have an impact.

### **Audience**

This session is geared towards research administrators involved in the:

- development of support and infrastructure systems
- pre-award and/or post-award process
- development of research careers
- development of research networks
- strategic development of research planning, activities and the overall research portfolio

## 13:30 – 15:00      **All the Right Moves: The Right Steps to a Fulfilling Career**

Speaker:      Denis Levesque, Big Dashan

Looking to move up? Change roles? Or confirm your career is moving in the right direction? Understanding your strengths, values and interests are key to determining the best way forward to a rewarding career. Attend this highly interactive 90-minute session to develop your career objectives. Delivered by high performance business coach Denis Levesque, participants will leave with better insights and an action plan to rev up their career in the next 90 days!

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*Tuesday, May 17*

13:30 – 15:00      **International Development Research Centre**

Speaker:      Ann Weston, International Development Research Centre

Since 1970, the International Development Research Centre (IDRC) has been helping to build the skills and expertise of people and institutions in developing countries to undertake the research that they believe is most needed to improve their own lives. Ideas and innovation will drive change and IDRC strives to ensure that the funding of ideas and innovation will have a positive and lasting impact for those in the developing and developed world.

IDRC's main activity is funding applied research and at the end of 2009–2010, the organization was supporting 1,021 research activities in 97 countries, in five thematic research areas: environment and natural resource management; information and communication technologies for development; innovation, policy, and science; research for health equity; and social and economic policy.

13:30 – 15:00      **Open Access –  
Why a Research Office Should Fund Publications, and Why  
Your New Best Friend Is the Library**

Speakers:      Stephen Choi, Ottawa Hospital  
Mona Nemer, University of Ottawa  
Leslie Weir, University of Ottawa

Open Access publishing is currently a mandatory part of CIHR funding and is being considered seriously by the other Councils. It could change the entire publishing funding model, and will most likely seriously affect the way your Research Office operates.

The University of Ottawa was the first Canadian university to set up an institution-wide "open access" (OA) initiative, encompassing a repository, an author's fund, and support for local OA journals. This session brings together three key players: the university Chief Librarian, the VP Research, and a researcher from the Faculty of Medicine, to describe how the initiative works and what they've learned during the first year of operation.

15:00 – 15:30      **Coffee Break**

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*Tuesday, May 17*

## 15:30 – 17:00 **CIHR - Recent Developments that Impact You!**

Speakers: Kristina Casey, CIHR  
Danika Goosney, CIHR  
Adrian Mota, CIHR

CIHR is two years into its five-year strategic plan, *Health Research Roadmap: Creating innovative research for better health and health care*. In this session, CIHR representatives will talk about recent program, policy and process enhancements that are being implemented as CIHR pursues *Roadmap's* four strategic directions towards CIHR's vision to secure Canada's place on the world stage of health research.

The CIHR Governing Council has commissioned a second International Review of CIHR. The purpose of the review, conducted in February and March 2011, is to assess the effectiveness of CIHR in fulfilling its mandate as outlined in the CIHR Act. At the time of the 2010 CAURA annual meeting, the coordination of the review had just begun. It is now well under way and we will provide an update on progress made and on feedback received from the research community during the review process.

In following the recommendations from the first International Review, CIHR continues to improve its programs, policies and business processes. We will present new developments in CIHR's research funding programs, including knowledge translation and international programs. In addition, we will provide updates on the Research Reporting System (RRS) and an update on the Common CV (CCV). We will also present changes to CIHR's policies, processes and business tools that have a direct impact on research institutions and researchers, including recent developments in ResearchNet and important changes stemming from the standardization of our internal business processes.

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

## 15:30 – 17:00 **Foundations**

Speakers: Barry Cole, Cole Foundation  
Hilary Pearson, Philanthropic Foundations Canada  
David J. Phipps, York University

The aim of this session is to increase understanding about the nature and the challenges of the relationship between private foundations and universities around research initiatives. Our objective is that participants will leave the session with sufficient knowledge to prepare and motivate their researchers and/or research teams to initiate the dialogue and to have productive partnerships with foundations where their research efforts can have an impact on community or policy.

### **Audience**

This session is geared towards research administrators involved in the:

- pre-award process
- development of research careers
- development of research networks
- strategic development of research planning, activities and the overall research portfolio

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*Tuesday, May 17*

## 15:30 – 17:00 **Where Do your Adjuncts Come From?**

Speakers: Joe Irvine, University of Ottawa  
Elizabeth White, NRC Steacie Institute for Molecular Sciences  
Subash Sad, Institute for Biological Sciences

Adjunct professors can have a prominent role in university research, and their employment relationship can provide both opportunities and challenges to overcome to ensure successful outcomes. Adjuncts come from many organizations such as government research labs and industry, and this allows for extensive collaboration on research initiatives. At the same time, research administrators have to be aware of additional due diligence which must be carried out in supporting such activity.

A panel will discuss this from a few different perspectives including that of: (1) a government research institute business development office for a federal department which employs numerous adjuncts involved in university collaborations, (2) a university technology transfer office supporting both contract research and intellectual property commercialization which interfaces with adjunct professors, and (3) an adjunct professor whom is very active in many research collaborations with various partners through his/her university appointment.

## 15:30 – 17:00 **PI Panel – Customer Service**

Speaker: Darlene Gilson, University of Carleton

What does the term “Customer Service” conjures up in people's minds? And, in their opinion, does it address what we do in research administration? Surveys and consultations with researchers have been done at Carleton asking what efforts they would find useful in that sense. The LEAN process will be discussed, a work in progress implemented at Carleton (taken from Toyota and modified from manufacturing to research administration). Also, other initiatives burgeoning around the country will be discussed, like grants facilitators or other such bodies. There's also the never-ending notions about central versus decentralized, pre-and post-award being together or apart. The concept of advocacy as part of our services will also be introduced. This session is intended to be interactive.

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Wednesday, May 18, 2011

Breakfast on own

09:00 – 12:00

Workshop

**Knowledge Mobilization:  
Research Tools and Services**

Speakers: Michael Johnny, York University  
David Phipps, York University  
Dominique Robitaille, Université du Québec à Montréal  
Joaquin Trapero, University of Victoria  
Laura Zink, University of Saskatchewan

Level: Intermediate/Advanced

Increasingly funding programs require our faculty to work with non-academic stakeholders and develop knowledge mobilization strategies (i.e. CIHR PHSI, SSHRC CURA, SSHRC Partnership 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 knowledge mobilization component – you, in all your free time? What does a Kmb Unit do? How can the Kmb Unit support faculty and students? How do you manage the expectations of faculty and research partners? Do funding agencies even care? ResearchImpact-RéseauImpactRecherche is Canada's knowledge mobilization network. In an interactive format (no talking heads!) the RI-RIR universities will share their Kmb tools and their Kmb stories.

09:00 – 12:00

**Tri-Agency**

Speakers: Isabelle Blain, NSERC  
Elizabeth Boston, NSERC  
Wendy Burgess, Secretariat on Research Ethics  
Francis Savage, CIHR

This session will cover the following topics:

1. Update on the development of Phase 3 of the *Memorandum of Understanding (MOU) on the Roles and Responsibilities in the Management of Federal Grants and Awards*;
2. Recent publication of the second edition of the *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans*;
3. Update on the revisions to the *Tri-Council Policy Statement: Integrity in Research and Scholarship*; and
4. Update on other tri-agency initiatives.

A "Question and Answer" period will follow.

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*Wednesday, May 18*

## 09:00 – 10:15      **Targeting International Funders**

Speakers:      Jill Hutchinson, Consultant  
Richard Maclure, University of Ottawa

Success in obtaining funding approval for an international research project lies in the ability of a researcher to understand the funder's mandate, goals and values and to orient and shape the proposal idea to fit the funder's needs. This presentation will consider how to develop a proposal idea that reflects the funder's identity by detecting the cues that appear on the funder's website and in the application guidelines. It will consider the common elements in proposal applications from the perspective of an evaluator judging proposals in a competitive review process. The post-award realities of conducting international research projects will also be discussed.

### **Audience**

This session is geared towards research administrators involved in the:

- pre-award process
- development of research careers
- development of external relations, research partnerships and networks
- strategic development of research planning, activities and the overall research portfolio
- anyone new to International Funding

## 09:00 – 10:15      **Gathering Research Admin KPI's**

Speakers:      Suzanne Board, ICP  
Michelle Boutin, ICP

The federal indirect cost of research program has provided desperately needed support for the university and college research community to help pay for part of the 50 cents on the (direct cost) dollar it costs to support research. The program has been in existence now for some years and has had a tremendous positive impact. Eligibility of spending ICP funding has been flexible. The challenge is being able to understand how this funding best supports/improves the research enterprise ie increases excellence and productivity and what are the appropriate measures. Michelle Boutin (director of the ICP program) and Suzanne Board will discuss the progress of the ICP program and a project underway to work with the university/college system to develop appropriate KPIs that will enable monitoring of the "health and sustainability" of the research support system in our research universities and colleges.

# Fabulous at 40!

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Wednesday, May 18

## 09:00 – 10:15      **Research Accounting for Researchers**

Speaker:      Sandra Nelson, Carleton University

For many years, the research community has been frustrated with the resources and information available to researchers at Carleton University. It has not been easy deciphering agency guidelines, university policies, forms and procedures, and the most frustrating of all, tracking financial accounts and figuring out how much funding is available to spend! The primary job for researchers is to conduct research, so why not make the administrative aspect as easy as possible?

In 2008, Carleton's Research Accounting unit began working on a new strategy where the researcher comes first. The principles behind this initiative are to provide the community with the right systems, training and resources to enhance the research capacity of the university. This session will look at the systems and resource changes that have taken place to meet the goals of this strategy. In particular, participants will be shown aspects of MyRe\$earch, the new module of Carleton's Research Administration software package. For more information on this system, please visit our website at <http://www2.carleton.ca/finance/research-accounting/myresearch/>.

## 10:15 – 10:30      **Coffee Break**

## 10:30 – 12:00      **Beyond Tri-Council Funding: Working with Government Science Agencies**

Speakers:      Alan Barinstain, Canadian Space Agency  
                     Dan Wicklum, Environment Canada  
                     Stephen Morgan Jones, Agriculture and Agri-Food Canada

NSERC, SSHRC and CIHR are the bread and butter of our workplace and we all know the rules of the game. But there are many other federal sources of funds available and the rules are not quite as clear or well-known. This session will look at research funding opportunities at Agriculture and Agri-Food Canada, Canadian Space Agency and Environment Canada. Panelists will discuss program delivery mechanisms (e.g. grants, contribution agreements, contracts), strategies for success in applying to these programs and the review process. Each panelist will address the strategic priorities of their specific agency and the political drivers behind program development. Internal research capacity, and the need to bring in external expertise (e.g. university researchers) to carry out targeted research will also be a topic of discussion.

The presentations will be followed by a question and answer period.

# Fabulous at 40!

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*Wednesday, May 18*

## 10:30 – 12:00 **SSHRC to CIHR Transition**

Speakers: Danika Goosney, CIHR  
Drew Gyorke, University of Toronto  
François Simard, SSHRC  
Tracy Vaillancourt, University of Ottawa and McMaster University

As many of our non-clinical health researchers undertake the transition of applying for funding from SSHRC to CIHR, there are a number of questions or concerns that come up regularly from our applicants, research services offices, and research facilitators that include:

- What are CIHR's programs and budget? Discussion on CIHR's Open and Strategic programs, statistics, and how the CIHR budget works.
- How do SSHRC's Standard Research Grant and Workshops and Conferences Grant programs map over to CIHR?
- How does the peer review process at CIHR work and how are social science or humanities proposals handled?
- How have CIHR and SSHRC been working together during this transition?
- Success Story: A PI discusses their success as a social scientist with CIHR's Open Operating Grant program.

## 10:30 – 12:00 **Clinical Trials: The Competitive Edge**

Speakers: Karen Arts, Ontario Institute for Cancer Research  
Marc Ruel, University of Ottawa, Ottawa Heart Research Institute  
Steve Slade, Association of Faculties of Medicine of Canada

This session will focus on the particular challenges facing clinical research administrators in the university, affiliated hospital or research institute setting, with content that will be applicable at both the institutional and study team level.

After a brief introductory presentation of data recently collected on the current status of clinical research in Canada, and a summary of the unique issues facing clinical research administrators, the session will move to an open and forward looking discussion of strategies which could be developed to become (and stay) competitive in this specialized area of research.

This will be an interactive session during which comments and suggestions from participants will be most welcome!