

## Research Administration Day (RAD) 2015

May 27, 2015

*“Research Administration - Behind the Scene”*



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### REGISTRATION / INFORMATION BOOTH / OPENING REMARKS

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#### RAD Registration/Information Booth

**Time:** 8:00 to noon  
**Room:** ECHA L1-490  
**Description:** Light refreshments provided.

#### RAD Introduction/Opening Remarks

**Time:** 8:30 to 8:45 am  
**Room:** ECHA L1-490  
**Introduction:** **Michael Walesiak**, Associate Director, Finance and Information Management, Research Services Office  
**Presenter:** **Martin Coutts**, AVP, Finance & Administration

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#### SESSION DESCRIPTIONS

##### 100 Level Sessions – Introductory

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<b>Session ID:</b>	<b>RAD 101</b>
<b>Time:</b>	9:00 to 10:15 am
<b>Room:</b>	ECHA L1-420
<b>Title:</b>	<b>Introduction to Research Administration</b>
<b>Presenter:</b>	<i>Angela McCormick</i> , Research Facilitator, Research Services Office (RSO)
<b>Description:</b>	This workshop is aimed at all administrators who are new to the world of research funding at the University of Alberta. The Life Cycle of a Grant will be explained from an administrator's perspective and guidance provided on how you can help make the process run most efficiently. The presentation will focus on what you need to know as you get started in your new position.
<b>Learning Outcomes:</b>	At the end of this session, attendees will have a better understanding of the main RSO forms and when to use them. Attendees will also have an opportunity to ask questions specific to the stream of research funding they support.

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#### SESSION DESCRIPTIONS 100 Level Sessions – Introductory

<b>Session ID:</b>	<b>RAD 102</b>
<b>Time:</b>	10:45 to 12:00 pm
<b>Room:</b>	ECHA L1-490
<b>Title:</b>	<b>Expenditure Testing and Tri-Agency/University Expense Eligibility and Compliance</b>
<b>Presenter:</b>	<i>Pat Jones</i> , Research Facilitator, Research Services Office (RSO)
<b>Description:</b>	This introductory level session on eligible and ineligible expenses will use the Tri Agency Financial Administration Guide and the University of Alberta Policies and Procedures Online (UAPPOL) website as the main sources of information. In addition, the University’s Guide to Financial Management will be referenced as a source of information about what constitutes “appropriate back up documentation” to support expenses. Attendees will be made aware of the most common eligible and ineligible expenses charged to research grants at the University of Alberta. Additional information shared in this session will be an explanation of what is expenditure testing, why the RSO does this, and what are the results?
<b>Learning Outcomes:</b>	Attendees will walk away with a better understanding of Tri-Agency and University of Alberta most common ineligible expenses.

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### SESSION DESCRIPTIONS 200 Level Sessions – Intermediate

**Session ID:** RAD 201

**Time:** 9:00 to 10:15 am

**Room:** ECHA L1-430

**Title:** Roles and Responsibilities in Finalizing a Research Contract

**Presenters:** Contracts & Agreements Team, Research Services Office (RSO):  
*Julaine Herst, Assistant Director*  
*Sharon Campbell, Agreements Administrator*  
*Maren Bolstler, Agreements Administrator*

**Description:** Finalizing a research contract is a collaboration between the **Researcher** and the **RSO** and each has a key role to play in order to conclude a contract. Our presentation will walk you through our online request form in Grants 3.0 and the essential “background” information the RSO requires in order to start contract negotiations. Negotiations can often be complex and our presentation aims to take the mystery out of such negotiations by providing insight into the key elements such as:

- Timelines
- Intellectual property
- Publication (including copyright/moral rights)
- Warranty/indemnification
- Payment provisions
- Certifications

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### SESSION DESCRIPTIONS 200 Level Sessions – Intermediate

<b>Session ID:</b>	<b>RAD 202</b>
<b>Time:</b>	10:45 to 12:00 am
<b>Room:</b>	ECHA L1-420
<b>Title:</b>	<b>Demystifying Partnership and Institutional Programs Research</b>
<b>Presenter:</b>	<i>Marita Hobman</i> , Senior Agreements Manager, Partnership and Institutional Projects, Research Services Office (RSO)
<b>Description:</b>	<p>The RSO is part of Central Administration under the Vice President Research. Most researchers and administrators at the University interact with us at the RSO at one time or another and many among faculty members and department/faculty administrators have regular contacts with us. But contacts are more often than not through exchange of forms and emails and the opportunity for face-to-face interaction is not there as often as we would wish. Furthermore, the organizational structure at the RSO can get a bit confusing with several “Teams” that manage different portfolios. This aim of this presentation is to present the Partnership and Institutional Programs Team, with special focus on Partnerships. We intend to do this in a largely interactive way with plenty of time for questions and answers and we plan to:</p> <ul style="list-style-type: none"><li>• Explain what makes a project a “partnership project”;</li><li>• Outline what happens at the office after a request for new project, amendment or subgrant has been submitted to the Partnership team;</li><li>• We will also talk about the points of interactions with researchers/ departments/ faculty, with the goal of enhancing the understanding for what can be done on the stakeholder side that will make us more efficient in managing those complex files;</li><li>• Last but not least, several members of the Partnership team will contribute to the presentation as a panel, which will provide an opportunity for our stakeholders to meet us in person and ask some of the questions that there is no time for when a project has to be urgently processed.</li></ul>

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### SESSION DESCRIPTIONS 300 Level Sessions – Advanced

**Session ID:** RAD 301

**Time:** 9:00 to 10:15 am

**Room:** ECHA L1-490

**Title:** **Unboxing Research Finance at the UofA**

**Presenters:** *Michael Walesiak*, Associate Director, Finance and Information Management, Research Services Office; *Chad Schulz*, Director of Integrated Finance Services

**Description:** Much has changed in Research Finance at the University of Alberta in the past year and you probably have several questions about what has happened. In this session, we will discuss these changes, answer your questions and provide an opportunity for you to provide feedback and thoughts on our processes. Chad Schulz will also be discussing the recently introduced position and its role within the institution. This will include a number of finance related initiatives currently being pursued at the institutional level with the involvement of the Finance Management Committee.

- Learning Outcomes:**
- Understand the purpose of the different General Ledger Fund codes (restricted/unrestricted/operating)
  - Processing journal entries
  - Understand the processing and allocation of the indirect costs of research
  - Future initiatives being planned for Grants 3.0
  - Purpose and overview of the Finance Management Committee
  - Purpose and overview of Integrated Finance Services

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### SESSION DESCRIPTIONS

#### 300 Level Sessions – Advanced

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<b>Session ID:</b>	<b>RAD 302</b>
<b>Time:</b>	10:45 to 12:00 am
<b>Room:</b>	ECHA L1-430
<b>Title:</b>	<b>International Mobility Program and Temporary Foreign Worker Program</b>
<b>Presenters:</b>	<i>Dallas Pelkey &amp; Cyndi Killingsworth</i> Academic Human Resources Officers, University of Alberta
<b>Description:</b>	This presentation will focus on Citizenship and Immigration Canada’s International Mobility Program as well as changes to the Temporary Foreign Worker Program. It will be an interactive session with plenty of time to pose questions.
<b>Learning Outcomes:</b>	<ul style="list-style-type: none"><li>• Provide participants with a greater understanding of how these programs affect the University.</li><li>• Provide participants with practical tips about how to use the programs when hosting or hiring foreign nationals.</li></ul>

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