



Pacific Regional Meeting

Thursday, October 24, 2019 | 8:30 am – 5 pm

Friday, October 25, 2019 | 7:30 am – 3 pm

University of California, Davis, CA

NORDP Pacific Regional Meeting

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Putah Creek Lodge, 685 Putah Creek Lodge Drive, Davis

Friday, October 25, 2019 | 7:30 am – 3 pm

UC Davis Conference Center, 550 Alumni Lane, Davis

Overview

This two-day conference will convene and strategize around the role of research development (RD) professionals across varied and diverse organizations - higher education, research institutes, industry, and as independents - in advancing the research enterprise across the Western region. The setting will provide the opportunity to network, establish new partnerships, and learn best practices, processes, and more from research development colleagues.

Specifically, the meeting will provide insights into:

- 2019 NORDP national annual conference RD presentations and trends;
- Key perspectives for long-term sustainability of RD operations;
- Insights into current practices and strategies for complex proposal development;
- Opportunities to enhance regional engagement and research collaborations; and
- Career guidance and knowledge-sharing for professional development

Outcomes

1. Network and engage as regional membership within NORDP
2. Establish regional partnerships
3. Share knowledge of best practices, processes, strategies within the research development field

Agenda – Day 1, Thursday, October 24, 2019

8:30 AM | Arrival and Breakfast

9:00 AM | Welcome and Introductions

9:15 AM | Keynote: Leveraging Strengths in the West: Diversity, Excellence, and Partnership
Mark Lagrimini, Vice Provost of Research and Extension, University of California, Agriculture and Natural Resources

10:15 AM | 15 minute break

10:30 AM | Responding to Change: Sustaining Research Development in the Current and Future Funding Environment

Facilitator: *Vanity Campbell, University of California, Agriculture and Natural Resources*

Panelists: *John Crockett, California State University, San Diego; Sharon Franks, University of California, San Diego; Gretchen Kiser, University of California, San Francisco; Barbara Sasso, University of the Pacific*

11:30 AM | Strategies for Developing Complex Proposals

Kristin Dolan, University of California, San Francisco; Michael Gallo, University of California, Irvine; Sandra Holden, Stanford University; Chandra Khan, California State University, Dominguez Hills

12:30 PM | Lunch and Best RD Resource Knowledge-Sharing Activity

1:30 PM | Professional Development Tactics to Consider at Each Stage of Your Career
Susan Emerson, Oregon State University; Eric Dickey, Western Oregon University

2:30 PM | Intelligence Gathering in Higher Ed. *Linda Galloway, Elsevier*

3:15 PM | 15 minute break

3:30 PM | Tips and Strategies for Coordinating Large Center Grants

Andrea Stith, University of California, Santa Barbara; Huguette Albrecht, University of California, Los Angeles; Sharon Franks, University of California, San Diego; Wendy Groves, University of California, San Diego; Kate Spohr, University of California, Berkeley; Erica Whitney, University of California, Berkeley

4:30 PM | Manetti Shrem Museum Tour

5:00 PM | Adjourn

6:00 PM | Dinner

Agenda – Day 2, Friday, October 25, 2019

7:30 AM | Arrival and Breakfast

8:00 AM | Seizing the Road Less Traveled: A Panel Discussion on Alternative Career Paths in Research Development

Facilitator: *Elizabeth Seckel, Stanford University*

Panelists: *Susan Carter, Santa Fe Institute; Jon-Michael Knapp, Luminint Consulting Group; Lisa Moy, Kaiser; David O’Keefe, Salk Institute for Biological Studies; Alan Paul, Giant Angstrom*

9:00 AM | Fostering Research Collaborations to Maximize Impact and Strategic Growth

Mariam Willis, Elsevier Research Intelligence

10:00 AM | 15 minute break

10:15 AM | Integrating Research Development in Cross-Campus Partnerships

Gretchen Kiser, University of California, San Francisco

11:00 AM | Roundtable: Creating a Culture of Grantsmanship at Predominantly Undergraduate and Teaching Institutions: Challenges and Opportunities (*Ballroom A*)

Eric Wayne Dickey, Western Oregon University; Susan Emerson, Oregon State University

11:00 AM | Breakout: Bouncing Forward Better: How We Can Help Ourselves – and PIs – Be More Resilient (*Ballroom C*)

Crystal Botham, Stanford University; Lynsey Fitzpatrick, University of California, San Diego; Sharon Franks, University of California, San Diego; Wendy Groves, University of California, San Diego; Sheryl Soucy-Lubell, University of California, Davis; Andrea Stith, University of California, Santa Barbara

12:00 PM | Lunch and Career Opportunities

1:00 PM | Breakout: Use Airtable to project manage your next proposal

Kristin Dolan, University of California, San Francisco (Ballroom A)

1:00 PM | Breakout: Workshops Ideas for Faculty and Trainee Proposal Writers (*Ballroom C*)

Crystal Botham, Stanford University; Sharon Franks, University of California, San Diego; Wendy Groves, University of California, San Diego; Andrea Stith, University of California, Santa Barbara

2:00 PM | Facilitated Small Group Discussions on Regional Engagement: How do we move forward to build greater regional collaboration for the Western region?

2:45 PM | Closure

3:00 PM | Adjourn

Program Description – Day 1

Presentations

Responding to Change: Sustaining Research Development in the Current and Future Funding Environment

RD professionals oversee, develop, and implement a broad spectrum of capacity-building activities focused on optimizing research funding success and fostering research innovation and impact. Such activities promote institutional research viability. How does research development position the institution to respond to a changing funding environment? Or, how do institutions effectively implement and optimize services to address changing institutional needs over time. How do RD offices plan ahead for these potential scenarios and implement sustainability best practices to help meet long-term operational goals? A panel discussion will explore these questions through the lens of experienced RD professionals representing varied institutions and research settings, sharing leader insights and strategies for long-term sustainability of RD operations. The facilitator will lead a conversation allowing panelists to share their perspectives on the challenges facing the field of RD today.

Facilitator: Vanity Campbell, University of California, Agriculture and Natural Resources

Panelists: John Crockett, California State University, San Diego; Sharon Franks, University of California, San Diego; Gretchen Kiser, University of California, San Francisco; Barbara Sasso, University of the Pacific

Strategies for Developing Complex Proposals

Federal and non-federal research sponsors are increasingly soliciting proposals for large, collaborative, multi-disciplinary research projects with the potential for transformative impact. As a result, research development professionals are often tasked with helping teams develop complex grant proposals. This session will explore a variety of strategies that research development professionals can use to help investigators craft complex grant proposals. We will discuss high-level grantsmanship strategies as well as operational tactics. These topics will be addressed from multiple institutional perspectives, including a large R1 university and a primarily undergraduate institution. Participants will leave the session with a toolkit of best practices to apply to complex proposal development.

Presenters: Kristin Dolan, University of California, San Francisco; Michael Gallo, University of California, Irvine; Sandra Holden, Stanford University; Chandra Khan, California State University, Dominguez Hills

Day 1

Professional Development Tactics to Consider at Each Stage of Your Career

No matter what career stage we're in, beginning, midway, or senior, our work in Research Development is to develop people professionally, ourselves included. Career development should be a part of every RD professionals' growth at each stage. Each phase has its own unique opportunities and challenges. Younger professionals may be able to move to different institutions; mid-career with family less willing to move; and late career professionals begin to consider a time when full-time work ceases. We all have a need to assess our development in order to meet the demands of changing work environments. The presenters will facilitate guided conversations to help participants consider areas of strength, and identify what skills to sharpen as they navigate through the stages of their careers. Through discussion and suggested planning tools, we will provide a way for participants to create roadmaps for key areas they want developed to enable their professional growth.

Reflection Questions: Your responses to the following questions will be used for small and large group discussions.

1. Where have I been and what have I accomplished in my career?
2. What am I doing now?
3. What are my 3 main strengths?
4. Where am I going and what do I still want to achieve?
5. Is there a skill that I need to sharpen before I move to the next phase or retire?
6. How can my institution help; what type of professional development opportunities are available?
7. Share 2 -3 training/professional development opportunities you have taken to improve your research development skills.

Presenters: Susan Emerson, Oregon State University; Eric Wayne Dickey, Western Oregon University

Intelligence Gathering in Higher Ed

Academic institutions are facing increasing obstacles to fulfilling their mission of teaching, research and civic responsibility. The competition for research funding and faculty has grown ever more intense, and making decisions regarding where to allocate resources ever more critical. Gathering competitive intelligence on your academic peers will help guide decision making by transforming disaggregated information into actionable intelligence. Learn about data sources, and how to contextualize data for stakeholders. This presentation is based on a NORDP 2019 session that was co-authored by Karen Walker and Jamie Welch from Arizona State University, and Linda Galloway from Elsevier.

Presenter: Linda Galloway, Elsevier

Day 1

Tips and Strategies for Coordinating Large Center Grants

Speakers will guide discussion of the challenges of coordinating large interdisciplinary and interinstitutional teams that are required for center grant funding initiatives. Each research team is unique and yet there are challenges they have in common, meaning that know best (and common sense) practices often must be adapted to work for a specific team. Thus, it is often a challenge for research development professionals to help PIs guide the strategic planning, project development and grant writing processes. How can we, as professionals, substantively contribute to these efforts by effectively conveying our specialized knowledge and actively facilitating and coordinating group dynamics? After a brief introduction, the presenters will serve as discussion leaders where participants can share lessons learned, discuss best practices and brainstorm new ideas. Each discussion group will focus on a different topic and at the end the groups will share highlights of their conversation with the entire group. Topics of discussion are as follows: Andrea Stith, cost sharing strategies; Hugnette Albrecht, identifying essential elements for an effective team and facilitating the formation of teams; Erica Whitney and Kate Spohr, integrating Broader Impacts efforts with existing campus opportunities; and Sharon Franks and Wendy Groves, strategic planning and preparation to initiate proposal development far in advance of the proposal submission deadline, and often in advance of the solicitation publication. **Presenters:** Andrea Stith, University of California, Santa Barbara; Hugnette Albrecht, University of California, Los Angeles; Sharon Franks, University of California, San Diego; Wendy Groves, University of California, San Diego; Kate Spohr, University of California, Berkeley; Erica Whitney, University of California, Berkeley

Tour

Manetti Shrem Museum Tour **254 Old Davis Road, Davis, CA**

With the same passion for experimentation that first brought prominence to the arts at UC Davis, the Manetti Shrem Museum cultivates transformational art experiences to inspire new thinking and the open exchange of ideas. Serving both the public and our university community with a dynamic artistic program, the museum: presents exhibitions and events that advance students' understanding of their place in the world; connects to faculty teaching and research; and creates a lively forum for community engagement and creative practice.

Program Description – Day 2

Presentations

Seizing the Road Less Traveled: A Panel Discussion on Alternative Career Paths in Research Development

Curious about how research development works outside the university setting or what it's like to put together a funding proposal for a company or community-based nonprofit? Dreamed of starting your own consultancy group but found yourself unsure of how to best position yourself in order to make that leap? Receive an in-depth tour of several alternative career paths and get your most pressing career development questions answered by attending this panel session. Panel Moderator Liz Seckel is a research development and fundraising professional with expertise both within and outside the university setting.

Facilitator: Elizabeth Seckel, Stanford University

Panelists: Susan Carter, Santa Fe Institute; Jon-Michael Knapp, Luminint Consulting Group; Lisa Moy, Kaiser; David O'Keefe, Salk Institute for Biological Studies; Alan Paul, Giant Angstrom

Integrating Research Development in Cross-Campus Partnerships

Research Development (RD) has emerged as a key component of the research enterprise, connecting stakeholders and partnering across the continuum of institutional research support functions. RD professionals often contribute to efficient collaboration between traditional research administration (grants and contracts), corporate and foundation relations, industry relations, library services, government relations, technology transfer, faculty development, and campus researchers and leadership. RD brings a set of skills and strategic activities that bridge and augment these different partners' purview. This interactive session will explore different ways that RD professionals collaborate with other critical research-related resource teams within their institutions to achieve broad strategic goals. Through interactive small group discussions, participants will share examples of their cross-campus collaborative engagement, detailing large and small ways that RD professionals contribute to their partners' success and to the overall institutional research enterprise. Attendees will come away with a compendium of creative partner engagement activities that they might implement at their own institutions.

Presenter: Gretchen Kiser, University of California, San Francisco

Fostering Research Collaborations to Maximize Impact and Strategic Growth

Collaborative research increases visibility in your community, motivates external funding, and can significantly increase scholarly impact. Identifying and tracking research collaborations enables you to better understand and engage in strategic research initiatives across your system. Analyzing research collaborations enables you to know where to foster relationships and where to direct support to maximize funding and impact. This presentation will provide case studies of ways Research Offices use SciVal to improve collaborations internally and externally.

Presenter: Mariam Willis, Elsevier

Day 2

Roundtables and Breakouts

Creating a Culture of Grantsmanship at Predominantly Undergraduate and Teaching Institutions: Challenges and Opportunities

Let's face it, sometimes faculty teaching loads are heavy. Sometimes tenure and promotion considerations are narrow. Institutional business service policies can be prohibitive. Developing strategies for pursuing grants at predominantly undergraduate and teaching institutions requires an institutional shift in culture. This round table discussion hopes to open up a conversation for RD professionals to identify and develop strategies and best practices. By the end of the discussion, participants will have some actionable items they can take back to their desks.

Presenter: Eric Wayne Dickey, Western Oregon University; Susan Emerson, Oregon State University

Bouncing Forward Better: How We Can Help Ourselves – and PIs – Be More Resilient

Disappointment inherently comes often for research development (RD) professionals – and for the faculty we support. Inevitably, the absolute number and proportion of declined proposals can leave us feeling discouraged and even ineffectual at times. What can we do to counteract the distressing effects of declined proposals and others sources of rejection related to the field of RD? The goal of this session is to engage participants' collective resourcefulness and creativity to identify ways we can build our own – and our faculty's – resilience to the wear and tear that's inherent in our work. In small-group, scenario-based exchange, participants will explore various approaches that may help in coming to terms with disappointment, regaining perspective, distilling valuable insight from rejection, and engaging others' help, so that we are not only able to persevere, but indeed grow more resilient and effective in our professional endeavors.

Presenters: Crystal Botham, Stanford University; Lynsey Fitzpatrick, University of California, San Diego; Sharon Franks, University of California, San Diego; Wendy Groves, University of California, San Diego; Sheryl Soucy-Lubell, University of California, Davis; Andrea Stith, University of California, Santa Barbara

Use Airtable to Project Manage Your Next Proposal

The UCSF Research Development Office (RDO) has recently adopted Airtable as its preferred project management tool. This free(!), online project management tool gives you the power of a super-flexible database to connect all aspects of your proposal development process —and design the perfect workflow—all in one place. In this hands on session, participants will 1) watch a short demo of Airtable (10 minutes), 2) see how the UCSF RDO is using Airtable to manage proposal development (15 minutes), and 3) spend time exploring the tool and setting up their own database (25 minutes). Bring your curiosity and laptops!

Presenter: Kristin Dolan, University of California, San Francisco

Day 2

Workshops Ideas for Faculty and Trainee Proposal Writers

Speakers will share workshop designs and strategies that impart proposal-writing skills to groups of junior faculty, postdocs, and/or graduate students. Crystal Botham (Making it Happen: Effective Peer Review) will describe a process for facilitating peer review of proposal documents, e.g., NIH's 1-page Specific Aims. This peer review process enables participants to both receive feedback and think like a reviewer, a highly valuable experience that improves future drafts. Sharon Franks and Wendy Groves (Tale of Two Assistant Professors) will describe an interactive, storytelling approach designed to illuminate both effective practices for developing and implementing research funding plans, as well as ways to avoid some common pitfalls early-career investigators encounter as they go about deciding which opportunities to pursue and developing their proposals. Andrea Stith (Confronting a Blank Page: Avoiding Writers Block, Procrastination, and Other Excuses) will present ideas for assisting junior faculty in getting started on and then actually completing their first proposal.

Presenters: Crystal Botham, Stanford University; Sharon Franks, University of California, San Diego; Wendy Groves, University of California, San Diego; Andrea Stith, University of California, Santa Barbara