

Research Admin Day Agenda | September 18, 2025

West Campus Conference Center – Building 800

Time	Title	Description	Location
8:15 - 9:00 am	Continental Breakfast		Event Room
9:00 - 9:15 am	Welcome Remarks	Presented by Lisa Mosley, Executive Director, OSP Jill Ely, Director, YSM Research Administration Darlene Jones, Sr. Director, FRMS Nancy Kendrick, Director, SPFA	Auditorium
9:15 – 10:00 am	Concurrent Session: Round Table Q&A	This Round Table Q&A will address both pre-submitted questions via a survey and live questions from the audience on Sponsored Projects Financial Administration (SPFA) topics such as: Award Setup, Cash & Invoicing, Financial Reporting, Compliance, Closeout, Federally Impacted Awards and any post-award financial inquiries. Speakers: Geoff Schempp, Accounting Supervisor, SPFA Wayne Hayes, Accounting Supervisor, SPFA Bill Nowitzke, Accounting Supervisor, SPFA Rob Sember, Award Setup Analyst, SPFA Kathleen King, Assoc. Director, SPFA John Maloney, Manager, SPFA	Auditorium
9:15 - 10:00 am	Concurrent Session: Pre-Pre-award (Yale Office of Research Development (YRD)) and Proposal Management (OSP)	This interactive session will include an overview of the Yale Office of Research Development (YRD), including: - What does YRD do? - What services are provided and when? - How is YRD connected with faculty? - How can YRD, OSP, and departmental RA support work together for successful submissions? Speakers: Christina McDonald, Director, Research Development Kelley Hall, Assistant Director, Proposal Management Karen Francis, Program Manager, Funding Opportunities Trisha Bailey, Research Development Specialist	Second Floor: Room 216 & 218

Time	Title	Description	Location
9:15 – 10:00 am	Concurrent Session: Clinical Trial Activation: The Who, What, When and How	Join representatives from the Office of Sponsored Projects (OSP), Yale Cancer Center (YCC), and the Yale Center for Clinical Investigation (YCCI) for a guided overview of the clinical trial activation process—from initial submission through OnCore setup and contract execution. This session will highlight the key steps, systems, and stakeholders involved, and share practical tips for navigating challenges and ensuring a smooth activation experience. Speakers: Jeffrey Allen, Director, Clinical Agreements Management, OSP Adam Roshka, Director, Finance and Administration, YCC Juliann Murphy, Assistant Director, Finance, YCC Eric Borchardt, Assoc. Director of Research Finance & Utilization, YCCI Carly Lovelett, Assoc. Director, Protocol Activation & Lifecycle Management, YCCI	Event Room
break			
10:15 - 11:00 am	Concurrent Session: Research Security Training Updates & Other Support Reminders	This session will provide an overview of Research Security Training requirements for covered individuals, senior/key personnel, and the institution. Additionally, we will review Other Support Disclosure requirements and will cover financial support and the various forms of in-kind support. Speakers: Maneesha Joshi, Director, Research Integrity and Security Office Kelly Fusco, Assistant Director, Research Security	Auditorium
10:15 - 11:00 am	Concurrent Session: Strategies for Complex Budget Development	This session will include strategies for coordinating and managing complex budget development at the proposal stage. Examples will be drawn from large-scale and multi-component proposals, such as NIH Program Projects and DARPA initiatives, to illustrate strategies for addressing complex sponsor requirements for a smooth, compliant submission. Speakers: Maria Marin, Pre Award Administrator, YSM Pre Award Kathryn Young, Pre Award Administrator, YSM Pre Award Kelly Snyder, Senior Grants Administrator, FRMS Mary Riedel, Grants Administrator, FRMS	Event Room
break			

Time	Title	Description	Location
11:15 - 12:00 pm	Keynote	Speaker: Michael Crair, Vice Provost for Research and William Ziegler III Professor of Neuroscience and Professor of Ophthalmology and Visual Science	Auditorium
12:00 - 1:15 pm	Networking Lunch Including networking lunch for Zoom attendees (breakout rooms) from 12:00-12:30pm		Event Room, Room 214, 216 and 218
1:15 - 2:00 pm	Compliance Panel	Speakers: Steve Murphy, Vice President for Finance and Chief Financial Officer Shannon Smith, Assistant Vice President and University Controller Ruth Philo, Executive Director, Internal Audit Alyssa Greenwald, Senior Associate General Counsel	Auditorium
break			
2:15 - 3:00 pm	Federal Updates	Speakers: Lisa Mosley, Executive Director, OSP Shannon Smith, Assistant Vice President and University Controller Beth Kingsley, Assoc. Director, Subaward Management Jess Caponigro, Associate Controller, YSM	Auditorium
break			
3:15 - 4:30 pm	Concurrent Session: Worksheets Tips and Tricks	Presentation 1: Discover how Workday Worksheets can help research administrators work more efficiently. This session will showcase practical applications of Worksheets, including a live demo demonstrating how the tool can streamline processes, reduce manual effort, and simplify financial management tasks. Speakers: Nick Balsamo, Assoc. Director, Internal Financial Reporting Alex Thomas, Sr. Financial Business Systems Analyst, Financial Reporting and Analytics Presentation 2: See how departments are practically using Workday Worksheets and PowerBI desktop to improve monthly processes and help PIs make financial decisions for their labs.	Auditorium

Time	Title	Description	Location
		Speaker: Morgan Lavigne, Assoc. Director, Post Award, FRMS	
3:15 - 4:30 pm	Concurrent Session: Research Administration and Workday Training	Presentation 1: This session will highlight RA training opportunities and mandates for staff. Additionally, we'll discuss how to find the most frequently accessed training by faculty and staff alike, like HSP and GCP, and the COI form, as well as solicit feedback and requests from the RA community on future offerings. Speakers: Madison Savage, Assoc. Director, ORC Katarzyna Sims, Training Manager, ORC Presentation 2: The Library Team: Your Research Allies Join us to discover how the library team can be your (and your faculty's) allies in every step of the research lifecycle—from adhering to grant funder and publisher guidelines, to implementing best practices for data management and storage, to publishing articles and managing impact and scholarly identity. In just 10 minutes, learn about the resources, consultations, workshops, and tools we offer to overcome research and data obstacles. Leave this session knowing what the library team offers for each step of your work and how to reach us for support! Speakers: Gavi Levy Haskell, Assoc. Director, Computational Methods & Data Janene Batten, Assoc. Director for Research Engagement, Marx Library Presentation 3: This session will provide an overview of WDL, focusing on general navigation and usage. We will explore how to browse for courses, highlighting assigned learning that is particularly relevant and useful for the RA audience. The session will conclude with a Q&A segment and a potential live demonstration to help solidify understanding. Speaker: Travis Holyfield, Learning & Development Consultant, Organizational Development	Event Room
4:30 - 5:30 pm	Reception		Event Room