

NCURA Region V Fall 2026 Meeting - Workshop Information

Sunday, November 1, 2026

Morning Workshops: 8:30 a.m. - 12:00 p.m.

WORKSHOP #1

Title: Pre-Award 101: Laying the Groundwork for Sponsored Project Success

Presenters:

- Abby Guillory, MLIS, CRA, Assistant Vice President for Research, The University of Tulsa
 - Abby Guillory, CRA, is the Assistant Vice President for Research at the University of Tulsa. Abby, an NCURA Distinguished Educator, has over 20 years of grant administration experience within higher education, non-profit, and for-profit organizations. She serves as a NCURA Fundamentals Traveling Workshop Faculty, author of numerous NCURA articles and publications, committee member, webinar faculty, and presenter, both regionally and nationally.

Objectives:

1. Participants will gain an understanding of the various stages and tasks associated with the pre-award phase of the sponsored projects lifecycle.
2. Participants will be able to identify the various elements of a proposal and list critical steps in their review and submission.
3. Participants will be able to prepare a basic project budget following federal cost allowability principles and sponsor guidelines.
4. Participants will be able to identify best practices for coordinating with principal investigators, departments, and compliance offices, ensuring proposals align with sponsor requirements and institutional policies (e.g., effort commitments, cost sharing, and conflict of interest disclosures).

Description:

New to pre-award and not sure where to start? You're not alone. Pre-award administrators juggle high-volume workloads, tight deadlines, and ever-changing regulations, often learning as they go. It's no surprise that the experience can feel overwhelming. This workshop cuts through the noise. You'll gain clarity on the pre-award process, build essential knowledge, and walk away with practical strategies to stay organized, anticipate challenges, and manage your workload with confidence.

WORKSHOP #2

Title: Build Your Own AI Policy Bot: Turning Federal Guidance into Actionable Answers for Research Administration

Presenters:

- James Hayward, Director of Post Award Management and Technology, Rice University
 - Not provided
- Eric Martinez, Assistant Director, Department of Business Intelligence & Enterprise Engineering, University of Texas-Rio Grande Valley School of Medicine
 - Not provided

Session Moderator:

- Thomas Spencer, PhD, MBA, Associate Vice President for Research Operations, University of Texas at Rio Grande Valley
 - Not provided

Description:

This hands-on workshop is built for research administrators who want practical, real-world applications of artificial intelligence. Participants will design and build an “AI policy bot” from scratch that can interpret and respond to questions using federal guidance such as Uniform Guidance 2 CFR 200, NIH Grants Policy Statement, and NSF Proposal and Award Policies and Procedures Guide.

The session is structured as a working build. Step by step, attendees will create a functional prototype that ingests policy content and produces grounded answers to common research administration questions. The goal is simple: leave with a tool you can take back and use. Beyond the build, the workshop addresses the realities of AI adoption. Participants will engage in direct discussion on how federal guidance intersects with institutional policy, where AI introduces risk, and how to maintain consistency, compliance, and audit readiness.

Led by two experienced professionals with deep backgrounds in both IT and research administration, this workshop blends technical execution with operational insight.

Prerequisites:

Bring a laptop and a willingness to engage. No advanced programming skills required, but familiarity with research administration concepts will help you move faster and get more value.

Workshop #3**Title: Clinical Trials 101****Presenters:**

- Dawn Underwood, PhD, Vice President for Research, Oklahoma State University Center for Health Sciences
 - Dr. Dawn Underwood is the Vice President for Research at Oklahoma State University Center for Health Sciences in Tulsa, Oklahoma. Dr. Underwood has been active in NCURA for 25 years, and in three different NCURA regions.

- Candida Barlow, PhD, MSN, CRN-BC, RN, Director, Clinical Research Trials, Oklahoma State University Center for Health Sciences
 - Dr. Barlow is the Director of Clinical Research and an Assistant Professor of Nursing at Oklahoma State University. A board-certified Clinical Research Nurse with more than 20 years of experience, she is recognized nationally for modernizing clinical trial operations and strengthening research integrity across academic and healthcare systems. Dr. Barlow leads enterprise-level initiatives in clinical trial management, regulatory compliance, and research education, with a proven record of implementing advanced computerized systems and aligning infrastructure with state, federal, and institutional standards. Her leadership integrates operational efficiency with rigorous compliance, enabling scalable, high-quality industry and investigator-initiated research.
- Scott Davis, BS, CRA, Retired Director of the Office of Research Administration, Oklahoma State University Center for Health Sciences
 - Scott Davis is the retired Director of the Office of Research Administration at the University of Oklahoma Health Sciences Center. With 30 years of experience in research administration, Scott led a dedicated team of six, overseeing both clinical trials/industry and service contracting teams. Scott has presented at numerous regional and national NCURA meetings. He currently serves on the Region V Mustang Mentoring Program Committee. In recognition of his outstanding contributions, Scott was honored with Region V's Distinguished Service Award in 2019 and in 2025 he received The Julia Jacobsen Distinguished Service Award.

Objectives:

1. Identify the foundational infrastructure necessary to establish and sustain a compliant clinical trials program.
2. Describe best practices for data governance and clinical trial management systems.
3. Apply practical approaches to clinical trial feasibility, budgeting, and financial management.
4. Recognize critical provisions in clinical trial agreements and effective negotiation strategies.
5. Implement operational best practices for study startup, conduct, monitoring, billing, and closeout.

Description:

Developing a successful clinical trials program requires more than identifying promising research opportunities—it demands a strong operational foundation, effective governance, sound financial management, and seamless collaboration among institutional stakeholders. This workshop provides a comprehensive roadmap for building and managing a robust clinical trials program from concept to study closeout. Participants will explore the essential components of clinical trials infrastructure, including policies and standard operating procedures. The workshop will also examine best practices for data governance and the integration of clinical trial

management systems (CTMS), electronic regulatory (eReg) platforms, and other supporting technologies. The session will guide attendees through the clinical trial development process, including protocol review, regulatory registration requirements, feasibility assessments, budgeting, and cost analysis. Participants will gain practical insights into negotiating clinical trial agreements, with discussion of key contractual provisions such as payment terms, indemnification, intellectual property, publication rights, data retention, audits, governing law, and protocol alignment. Attendees will leave with practical strategies, tools, and best practices to strengthen their institution's clinical trials operations and improve efficiency, compliance, and research success.

Afternoon Workshops: 1:00 p.m. – 4:30 p.m.

Workshop #4

Title: Flight Path to Success: Navigating Post-Award Fundamentals

Presenters:

- Angela Mazzolini, Assistant Managing Director - Grants Management Team, Texas Tech University
 - Angela Mazzolini is the Assistant Managing Director for the Grants Management Team in Accounting Services at Texas Tech University. She has both her Bachelor's and Master's degrees from TTU and received her CRA last year. Entering her 6th year of research administration, Angela oversees a team responsible for post-award financials in a central office. She is also very honored to be serving as this year's Program Education Chair for the Fall meeting. Angela is a self-proclaimed Disney Adult and her favorite characters are Winnie the Pooh, Cinderella, and Leia Organa.
- Laura Rosales, Administrator III, Baylor College of Medicine
 - Laura Rosales, Ed.D., MBA, CRA is the Administrator III for the Department of Molecular and Human Genetics at Baylor College of Medicine (BCM) where she directs all administrative operations for the department, including research administration. She chairs the BCM Community of Practice-Research Administration, which provides professional development and best practice discussions for over 150 departmental research administrators. Prior to joining BCM, Laura served as Director of Sponsored Programs at Texas A&M University-Corpus Christi and The University of Texas Medical Branch at Galveston, both in the central offices. Laura has been a member of NCURA since 2001 and currently serves as faculty with the NCURA Traveling Workshop Program.

Objectives:

At the conclusion of the workshop, participants will

1. Have a clear understanding of all post-award components, from new award to termination of the award.
2. Have learned and discussed challenges and strategies for how best to manage awards.
3. Have shared best practices on policies and processes and identify how to adopt them at their institutions.

Description:

This workshop will guide you along the full flight path of an award, from pre-takeoff setup to final landing and closeout. En route, we will navigate key areas including financial management, subaward oversight, cost sharing, rebudgeting and modifications, compliance monitoring, effort reporting, sponsor reporting, and audits. Participants will discuss turbulence points, explore proven strategies for a smooth flight, and share best practices they can implement immediately.

Workshop #5

Title: Beyond the Interview: Elevating Interview Skills for Candidates & Hiring Managers

Presenters:

- Stacy Pritt, DVM, MS, MBA, CPIA, CHRC, EXCS, ECoP(EAR), DACA, Associate Vice Chancellor & Chief Research Compliance Officer, Texas A&M University College of Veterinary Medicine & Biomedical Sciences
 - Dr. Pritt is the Associate Vice Chancellor and Chief Research Compliance Officer at the Texas A&M University System and oversees research compliance across 12 universities and 8 state agencies. After earning her veterinary degree, she completed an MBA in Healthcare Management and MS in Managerial Science. Her other credentials include Certification as a Professional in IACUC Administration (CPIA), Certification in Healthcare Research Compliance (CHRC), two export control certifications, and board certification in animal welfare.
 - To date, Dr. Pritt has given over 100 professional lectures and authored or co-authored dozens of publications.
- Sheleza Mohamed, MBS, MHA, FACHE, CRA, CFRA, CPRA, Senior Administrator, University of Chicago
 - Sheleza Mohamed, FACHE, MHA, MBA, CRA, CFRA, CPRA is an award-winning international speaker and contributing author and editor of publications in the field of Research Administration. Sheleza holds the designation of American College of Healthcare Executives Fellow in addition to all three research administration council certifications Certified Research Administrator, Certified Financial Research Administrator, and Certified Pre-Award Research Administrator. Sheleza's commitment to RA is evident most

notably in her previous roles as Chair of NCURA Region V and Board of Director for RACC.

Objectives:

Beyond the Interview: Elevating Interview Skills for Candidates & Hiring Managers will cover the following:

1. Branding
2. Executive Presence
3. Lessons to Master Before the Interview Main Event
4. Recovery and Re-engagement
5. Managers Quick Guide

Description:

Effective interview skills and self-stewardship are essential for career growth and meeting individual and organizational initiatives. Our comprehensive workshop is designed to equip candidates with insight on branding, demonstrating an executive presence, mastering essential interview skills, and examining the main event. Additionally, we will discuss how to develop a plan that includes recovery and re-engagement when disappointment occurs.

We will also equip managers with the skills, knowledge, and tools necessary to identify the right candidate, make informed decisions, deploy effective interview techniques to secure quality employees to meet organizational strategies while fostering a healthy work environment. Participants will learn various interviewing styles and gain further insight with a manager's quick guide. By the end of the workshop, participants will be able to elevate their interviewing skills, approach interviews with newfound confidence, and hire more successfully.

Workshop #6

Title: NSF Secure

Presenters:

- Lori Schultz, MACC, CRA, Deputy Director, NSF SECURE Center and Assistant Vice President, Research Administration, Colorado State University
- Amanda Humphrey, MBA, CRA, Chief Research Operations Officer, Northwestern University

Objectives:

1. Participants will practice doing tabletop exercises on research security to assess processes.
2. Participants will include NSF SECURE Center tools in their work and provide insights into adoption barriers.

3. Participants will have an opportunity to provide feedback on the NSF SECURE Center's resources.

Description:

This half-day workshop is designed to build connections between research administrators working in or interested in the research security space. This hands-on session will provide opportunities for participants to work with colleagues across the research administration spectrum to assess case studies. Working in small teams, participants will map processes, roles, understand gaps and frame recommended process improvements. The workshop will also include opportunities to consider how SECURE Center resources can support ongoing process improvement efforts in research security work. There will be an emphasis on building connections with peers.

Workshop #7

Title: The Leadership Lab: Solving Real-World Challenges in Research Administration

Presenters:

- Robyn Remotigue, MPPA, CRA, Executive Director, Research Services, UNT Health Fort Worth
 - Robyn Remotigue, MPPA, CRA, is Executive Director of Research Services in the College of Nursing at UNT Health Fort Worth, where she is building comprehensive research support services for faculty. With more than 25 years of leadership experience in research administration, she has led pre-award, post-award, compliance, and regulatory programs across multiple institutions. An active leader in the National Council of University Research Administrators (NCURA), Robyn serves as traveling workshop faculty, PEER reviewer, and magazine editor. She previously founded NCURA Region V's Mustang Mentoring Program and is a graduate of NCURA's Executive Leadership Program.
- Courtney Swaney, MPA, CRA, Principal, Attain Partners
 - Courtney Swaney, MPA, CRA, is a Principal in the Attain Research practice at Attain Partners with more than 20 years of experience in research administration. She partners with colleges and universities on grants management consulting, organizational assessments, operational improvement, and research administration modernization. Prior to joining Attain, Courtney served as Associate Director of Pre-Award at The University of Texas at Austin, where she was an institutional signing official and led proposal review, award acceptance, contract negotiation, and research administration initiatives. An active NCURA member, speaker, and volunteer, Courtney is passionate about advancing the research administration profession through collaboration and mentorship.

- Kay Gilstrap, CRA, Director of Internal Controls and Policy Development, Georgia State University
 - Kay Gilstrap, C.R.A., is the Director of Internal Controls & Policy Development at Georgia State University. Kay has more than 30 years' experience in Research Administration and has been a member of the National Council of University Research Administrators (NCURA) since 2007. In NCURA she has served as Treasurer, Chair, and Regionally Elected Board Member for Region III and is currently serving as Treasurer, Financial Research Administration Traveling Workshop Faculty Member and as a Life Cycle of the Award faculty member. She has served on numerous committees, has co-authored several articles, and has presented at many meetings. She is also a faculty member of Georgia State University's research administration training program. She is a graduate of the NCURA 2022 Executive Leadership Program. Kay can be reached at kgilstrap@gsu.edu.

Objectives:

Through participation in this workshop, attendees will have the opportunity to:

1. Explore adaptive leadership strategies.
2. Discuss approaches to organizational and regulatory challenges.
3. Consider strategies for supporting teams through change.
4. Analyze leadership case studies and share perspectives with peers.

Description:

The Leadership Lab: Solving Real-World Challenges in Research Administration is an interactive, executive-level workshop designed for experienced research administration leaders navigating the increasingly complex landscape of sponsored programs management. Through facilitated discussion, leadership-focused case studies, peer-to-peer problem solving, and practical leadership frameworks, participants will examine the real-world challenges facing research administration offices today—including regulatory fatigue, change management, staff burnout, institutional tensions, succession planning, and balancing compliance with organizational culture. Unlike a traditional lecture-based session, this workshop is structured as a collaborative “Leadership Lab” where participants serve as both learners and advisors. Attendees will work in small groups to analyze authentic leadership scenarios, identify underlying organizational and cultural challenges, and develop strategic recommendations that can be applied within their own institutions. The workshop emphasizes adaptive leadership, practical decision-making, and peer engagement while recognizing that leadership in research administration rarely involves one “right” answer.

Who Should Attend:

This workshop is intended for senior-level research administrators and institutional leaders who:

- Have 5+ years of research administration experience

- Have at least 2 years of supervisory or management experience
- Lead staff, oversee operations, or contribute to institutional policy development
- Work in central or departmental research administration offices
- Are responsible for implementing evolving federal, state, sponsor, and institutional requirements within their organizations

High-impact emerging leaders with relevant experience may also be considered.

This is a highly interactive workshop with an expectation of participation. Attendees will engage in small-group discussions, case study analysis, leadership reflection activities, and facilitated report-outs throughout the session. Participants are encouraged to bring examples and perspectives from their own institutional experiences.