

# NCURA Region V Fall 2026 Meeting - Workshop Information

**Sunday, November 1, 2026**

## **Workshop Schedule**

**7:30 a.m. – 8:30 a.m. - <sup>1</sup>Breakfast** (included with **paid** morning workshop registrations)

### **Morning Workshops**

**8:30 a.m. – 12:00 p.m.**

- Workshop #1: *Pre-Award 101: Laying the Groundwork for Sponsored Project Success* (p.2)  
(\$125 registration fee)
- Workshop #2: *Practical AI in Research Administration: Building Policy Librarians and Workflow Tools* (p.3-4)  
(\$125 registration fee)
- Workshop #3: Canceled

**12:00 – 1:00 p.m. - Lunch** (Lunch is on your own)

### **Afternoon Workshops**

**1:00 – 4:30 p.m.**

- Workshop #4: *Flight Path to Success: Navigating Post-Award Fundamentals* (p.5)  
(\$125 registration fee)
- Workshop #5: *Beyond the Interview: Elevating Interview Skills for Candidates & Hiring Managers* (p.6)  
(FREE; No registration fee)
- Workshop #6: *NSF SECURE Center: Resources for a Changing Time* (p.7)  
(FREE; No registration fee)
- Workshop #7: *The Leadership Lab: Solving Real-World Challenges in Research Administration* (pgs.8-9)  
(FREE; No registration fee)

\*Note: The workshops are 3.5 hours long with presenters providing a few breaks during the workshop. If special accommodations for the workshop are requested, please contact [ncuraregionv@gmail.com](mailto:ncuraregionv@gmail.com)

---

**NOTE: Workshop Information located on pages 2 - 9**

---

<sup>1</sup> Version 9.23.2026

## **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 is 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.

**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.

**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).

## WORKSHOP #2

**Title:** *Practical AI in Research Administration: Building Policy Librarians and Workflow Tools*

**Presenters:**

- **James Hayward**, Assistant Director of Technology and Innovation, Rice University
- **Thomas Spencer**, Ph.D., MBA, Associate Vice President for Research Operations, University of Texas at Rio Grande Valley

**Description:**

This hands-on, half-day workshop is built for research administrators who want practical, real-world applications of artificial intelligence. Transitioning from abstract concepts to actual execution, participants will explore how enterprise AI tools can support existing workflows without compromising security or compliance. Emphasis will be placed on demonstrating equivalent builds using both Google and Microsoft ecosystems.

The session is structured in three core components:

1. **Scope, Guardrails, & Caveats:** We will establish clear boundaries for AI adoption, defining what administrators can safely explore on their own and when institutional IT must be involved.  
*Please note: This workshop is strictly an educational sandbox. Nothing built during this session is "authorized by NCURA" or formally endorsed for institutional use.  
The intent is to demonstrate AI's potential capabilities, not to authorize the deployment of the specific prototypes created.*
2. **The Intelligent Librarian (Notebooks):** Participants will be guided step-by-step to create a "policy librarian" chatbot designed for departmental-level post-award management. We will demonstrate how to build this tool using both **Google NotebookLM** and **Microsoft Copilot Notebooks**, allowing attendees to construct a localized, isolated workspace grounded explicitly in their institution's uploaded policy documents.
3. **The Compliance Workflow (Cost Transfer Formatter):** We will engineer a custom AI workflow assistant—a Gemini Gem—specifically designed to support compliance. Participants will learn how to prompt the AI to evaluate cost transfer justifications against federal standards (like the 90-day rule and allocability), ensuring the output is complete, consistent, and formatted cleanly for enterprise systems.

**Prerequisites:**

- Bring a laptop and a willingness to engage. No programming skills are required.
- Please compile a list or prepare a cloud folder of your university's specific post-award policies prior to the session. You will gain the most from the session if you can provide these documents to the AI as PDFs, Word documents, or direct URLs.
- Familiarity with research administration concepts (specifically post-award management) will help you move faster and gain more value from the guided builds.

## W#2 Learning Objectives:

By the end of this workshop, participants will be able to:

1. **Establish AI Boundaries:** Differentiate between safe, independent AI experimentation in research administration and initiatives that require formal IT oversight.
2. **Deploy a Policy Sandbox:** Construct an isolated "intelligent librarian" chatbot using either Google NotebookLM or Microsoft Copilot Notebooks to quickly query post-award management policies.
3. **Engineer Compliance Prompts:** Design and configure a customized AI assistant (Gemini Gem) with strict fact-gating rules to evaluate and format compliant cost transfer justifications.

## 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 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, Department of Molecular and Human Genetics at Baylor College of Medicine (BCM) 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.

**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.

**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.

## Workshop #5 [FREE Workshop]

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

### **Presenters:**

- **Stacy Pritt**, Stacy Pritt, DVM, MS, MBA, CPIA, CHRC, EXCS, ECoP(EAR), DACAW, Associate Vice Chancellor & Chief Research Compliance Officer for the Texas A&M University System 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 diplomate status within the American College of Animal Welfare (ACAW).
  - To date, Dr. Pritt has given over 100 professional lectures and authored/co-authored dozens of publications.
- **Sheleza Mohamed**, MBS, MHA, FACHE, CRA, CFRA, CPRA, Senior Administrator, University of Chicago 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.

### **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.

### **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

## Workshop #6

[FREE Workshop]

**Title:** *NSF SECURE Center: Resources for a Changing Time*

### **Presenters:**

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

### **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.

### **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.

Workshop #7  
[FREE Workshop]

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

**Presenters:**

- **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 has 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 has more than 40 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.

**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.

**W#7 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.

**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.