

# Developing Institutional Strategies for Growing Global Research

Location: University of South Florida, Tampa

Dates: April 6 - 8, 2014

[Website](#)

Sponsored by Association of International Education Administrators (AIEA), the University of South Florida (USF), and the University of North Texas (UNT) in cooperation with George Mason University, the American Council on Education (ACE) and Elsevier.

AIEA Thematic Forum: Developing Institutional Strategies for Growing Global Research

The AIEA Thematic Forum: Developing Institutional Strategies for Growing Global Research was held on April 6-8, 2014 at the University of South Florida in Tampa, Florida. The Forum was organized by the University of South Florida (USF) and the University of North Texas (UNT) and was sponsored by the Association of International Education Administrators (AIEA), Elsevier Publishing Company, and the National Organization of Research Development Professionals (NORDP). The Forum was attended by more than 100 senior administrative leaders representing offices of research and/or international engagement representing over 40 U.S. universities and 15 funding agencies from 12 countries.

The Forum opened with a dinner and keynote address by Dr. Rob Bertram, Director of the Office of Agricultural Research and Policy in the Bureau for Food Security at the U.S. Agency for International Development (USAID). The first day's sessions included a panel and participant discussion on "Articulating the Value Proposition—Making the Case for Institutional Global Engagement in Research." The afternoon included thematic sessions in which participants worked collaboratively in groups to discuss effective practices universities utilize as they engage in global research and how research and international offices can better cooperate to advance global research. The evening sessions included a social networking reception with representatives of international funding agencies and a dinner with a keynote address by Dr. Bill Colglazier, Science and Technology Adviser to the Secretary of State at the U.S. Department of State. The last day of the Forum included a morning reporting out session that synthesized the information gathered during the previous day's afternoon thematic sessions followed by a lunch with a keynote address by Dr. Kathie L. Olsen, Founder and Managing Director of ScienceWorks and former Deputy Director and Chief Operating Officer of the National Science Foundation. The afternoon included concurrent presentations on global research opportunities by funding agency representatives. The proceedings of the Forum will be published by Elsevier Publishing Company and released later this year.

The Forum is a working meeting for Senior International Officers (SIOs), Vice Presidents for Research (VPRs), Graduate Deans, Provosts and faculty to identify best practices for developing institutional strategies for globalizing the research mission of the university.

## Developing Institutional Strategies for Growing Global Research

An AIEA Thematic Forum • April 6 — 8, 2014 • University of South Florida, Tampa



REGISTRATION OPENS JANUARY 6, 2014

# SAVE THE DATE

APRIL 6-8, 2014

### Forum Highlights:

**Articulating the Value Proposition—Making the Case for Institutional Global Engagement in Research** will result in a statement of the value to the institution for SIOs and VPRs to use in making the case for a proactive institutional engagement strategy to grow global research at a university.

**Track I: Promoting and Advancing Global Research** will delve into institutional incentives and challenges to creating a globally-focused research campus, optimizing faculty and student engagement in global research, global research-friendly policies, reward and incentive structures for results.

**Track II: Managing International Research and Global Partnerships** will engage participants in a discussion of institutional best practices in carrying out a global research enterprise, including managing risk, IP, research integrity, accountability and mutual understanding among global partners, and structuring research relationships in multi-cultural and multi-language environments.

- Metrics for Assessing the Management of International Research and Global Partnerships
- Global Research Funding Agency Networking

**Who should attend? Leaders of research and international programs at research-active public and private universities.**

**Join the conversation next April in Tampa...**

Learn more and register at [global.usf.edu/globalforum/](http://global.usf.edu/globalforum/)  
Contact Annie Tai at (813) 974-0589 or [AnnieTai@usf.edu](mailto:AnnieTai@usf.edu) for information.

# April 2014 AIEA Thematic Forum

Developing Institutional Strategies for Growing Global Research

An AIEA Thematic Forum dedicated  
to advancing international research



University of South Florida  
Tampa, Florida  
April 6-8, 2014

## Acknowledgements from the Forum Organizers

The 2014 AIEA Forum: Developing Institutional Strategies for Growing Global Research, organized and hosted by the University of South Florida (USF) and the University of North Texas (UNT), provided a “high dialogue” venue for senior international officers, vice presidents for research, public policy makers, industry leaders in higher education, global research funding agency representatives, and other important stakeholders. The goal of the forum’s exchanges across and among participants is to improve the environment at universities in order to better support global research engagement including leveraging support from international funding agencies.

USF and UNT would like to acknowledge the sponsors and supporters who made the forum possible. The Association of International Education Administrators (AIEA) created the opportunity for the event and provided critical support and outreach throughout the planning process.

Platinum sponsors include Elsevier Publishing Company; USF World; USF Research & Innovation; and the University of North Texas (UNT). The National Organization of Research Development Professionals (NORDP) served as a gold sponsor. The support of the American Council on Education (ACE) is also greatly appreciated.

The organizers also recognize the contribution made by Dr. Eirini Gouleta, Associate Professor of International Education and Academic Program Coordinator for ESL/FL/MME, College of Education and Human Development, George Mason University.

Dr. Gouleta designed and managed a pre-forum survey designed to evaluate the opinions of administrators from research and international offices regarding the level of coordination between the two units, familiarity with each other’s responsibilities, and the priority of international research within the home institution.

In particular, USF and UNT recognize the members of the AIEA Forum Advisory Committee for their insightful contributions and guidance in the development of the forum agenda and their active participation in forum events.

The keynote speakers, representing public, private and NGO perspectives, provided stimulating presentations and lively discussion; as did the participation of representatives from fifteen different international funding agencies and organizations. We are especially grateful for the support of USF President Judy Genshaft for her leadership of globalization efforts at the University and in her many national roles including the presidency of the APLU Commission on International Initiatives.

Lastly, a heartfelt, thank you for the time and energy devoted to making the Growing Global Research Forum a tremendous success from colleagues at USF and UNT including administrators, staff, faculty and students.



*Kiki Caruson*

**Kiki Caruson**  
Assistant Vice President for  
Research, Innovation, and Global Affairs  
University of South Florida



*Richard H. Nader*

**Richard H. Nader**  
Vice Provost for  
International Affairs  
University of North Texas



## Overview

The AIEA Thematic Forum: *Developing Institutional Strategies for Growing Global Research* was held on April 6-8, 2014 at the University of South Florida in Tampa, Florida. The Forum was organized by the University of South Florida (USF) and the University of North Texas (UNT). The Forum was made possible through funding from the Association of International Education Administrators (AIEA) as well as sponsorship from Elsevier Publishing Company, and the National Organization of Research Development Professionals (NORDP), and the support of the American Council on Education (ACE). The Forum was attended by more than 100 senior administrative leaders representing offices of research, international engagement or graduate education from more than 40 U.S. universities as well as 15 research funding agencies from 12 countries.

For more information visit <http://global.usf.edu/globalforum/>

## Introduction

The nature of research and discovery has become increasing global and the challenge of financing high-impact academic and scientific inquiry increasingly more demanding. Yet, university researchers and graduate students overwhelmingly rely on funding agencies that are nationally-focused. U.S. federal funding for research and development has remained relatively flat in recent years. “Just five years ago, the U.S., Canada and Mexico were responsible for nearly 40% of global R&D.” The U.S. share has dropped from 34% in 2009 to 31% today. “Where the west has retrenched, Asia has advanced.” For example, China has sustained a high level of research intensity and “its R&D investments are now more than 60% those of the U.S” (Battelle, 2014 Global R&D Funding Forecast, December 2013, [www.rdmag.com](http://www.rdmag.com)).

Funding from international organizations and agencies is accessible to U.S. scholars and their respective institutions and represents an important avenue for catalyzing new research and deepening existing initiatives. Researchers who coauthor with colleagues from other nations generate more widely cited and higher impact publications (Elsevier Data Analytics).

In an effort to mobilize more robust institutional strategies for globalizing the research mission of U.S. universities, USF and UNT brought together Senior International Officers (SIOs), Vice Presidents for Research (VPRs), Graduate Deans, and other key university administrators and faculty to identify best practices and strategies.

Far too often, administrators from research and international offices collaborate only infrequently, rarely share personnel or physical space, have limited knowledge about each other’s day-to-day activities, and may not speak the same “language” in terms of priorities, evaluation metrics, and business practices. Unfortunately, there are too few opportunities for administrators in the research enterprise and those representing international initiatives to interact, form personal relationships, and identify ways for fostering greater cooperation between the two offices. For global research to flourish within and across universities, both the research enterprise and the international office must value each other’s contribution to research engagement and identify ways of collaborating to advance internationally funded and focused research endeavors.

“There are research opportunities worldwide, but only a limited number of universities have developed a strategic approach to capitalize on these. This forum offers an opportunity to launch a national discussion on the challenges and solutions to developing a strategic global research plan for U.S. universities.”

- Thomas McCoy, Vice President for Research and Economic Development,  
University of North Texas.

## The Goals of the Forum

- A shared and interactive learning environment that promotes dialogue across traditional administrative boundaries—most notably between research and international offices.
- The opportunity for senior university administrators, key federal agency policy makers, non-profit organizations, private industry, international funding agencies and interested faculty to come together to share opinions and experiences about how such a diverse community can work together to advance knowledge, innovation and solutions to the world's most pressing challenges through global research engagement.
- Greater understanding of the challenges and opportunities in creating a culture of globally-integrated research.

- Identification of best practices based on successful efforts to facilitate and promote global research within the university environment.
- Articulation of a common values statement concerning the importance of international research engagement to the university mission.
- Integration of the perspectives of international funding agencies into the discussion of how to best stimulate and sustain global research.
- Networking opportunities for participants.
- Build on the success of the Global Research Funding Forum sponsored by the University of North Texas, February 4-5, 2013. <https://international.unt.edu/global-research-funding-forum>

## Forum Sessions

Over the course of the three day Forum, keynote speakers, expert panels, and a series of interactive break-out sessions designed for active participation aided in the identification of best practices and examples of successful programs, policies and procedures within and across the university setting that are essential for facilitating globalized research. In addition, representatives from fifteen international funding organizations and agencies added their voices and opinions to the discussion. Participants enjoyed multiple opportunities to network and socialize with each other, the keynote speakers, and with the international funding agency representatives.



Dr. Libby Lyons at registration.



Dr. Bill Colglazier in conversation.



Discussion among Forum participants.

*The event featured conversations with two key advisers at the U.S. State Department: Dr. Bill Colglazier, the Science and Technology Advisor to U.S. Secretary of State John Kerry; and Dr. Elizabeth “Libby” Lyons, on detail from the National Science Foundation as a Senior Advisor to the Office of the Science and Technology Adviser to the Secretary (STAS) and to the Bureau of Oceans and International Environmental and Scientific Affairs (OES). These conversations will be instrumental in developing future U.S. policies to support international, academic research collaborations.*



USF President, Judy Genshaft, addresses Forum participants at the Welcome Dinner.



Panel Discussion: Drs. Jane Gatewood, Prema Arasu, Bill Farland, and John Carfora (L to R).

### *Sunday, April 6, 2014*

The Forum opened with a dinner, welcome remarks from USF President Judy Genshaft, PhD, and keynote address by Dr. Rob Bertram, Director of the Office of Agricultural Research and Policy in the Bureau for Food Security at the U.S. Agency for International Development (USAID). Dr. Bertram spoke about the agency's strategies and investments in technology, research and policy under the Feed the Future program, the U.S. government's global food security initiative, as well as the newly created U.S. Global Development Lab.

Opening events were held in the Atrium of the Interdisciplinary Research Building, which houses USF core facilities and labs.

### *Monday, April 7, 2014*

The first full day included a panel and participant discussion titled: "Articulating the Value Proposition—Making the Case for Institutional Global Engagement in Research." The conversation, moderated by Dr. John Carfora, Associate Provost for Research Advancement and Compliance, Loyola Marymount University, included ideas and strategies from three senior administrators with a successful track record of promoting international research engagement: Colorado State University represented by Dr. William Farland, Senior Advisor to the Executive Vice President and Former Vice President for Research; Kansas State University represented by Dr. Prema Arasu, CEO/Vice President of the Kansas State University Olathe Campus; and the University of Georgia represented by Dr. Jane Gatewood, Director of International Partnerships.

A working lunch featured a panel presentation, "Bridging the Divide—Closing the Gap," including a discussion of sophisticated data

analytics from Elsevier Publishing as well as strategies for promoting, managing and measuring global engagement from Huron Consulting Group. Dr. Karen Holbrook, Senior Advisor to the President at USF and the former President of The Ohio State University set the stage for the panelists' presentations and moderated discussion.

The afternoon was dedicated to thematic sessions in which participants worked collaboratively in groups to discuss effective practices utilized by universities as they engage in global research and how research and international offices can better cooperate to advance global research.

### Monday, April 7, 2014 (cont.)

The evening session included a social networking reception with representatives of international funding agencies and a dinner with a keynote address, The Global “Science, Technology, and Innovation” Horizon and the American Research University, presented by Dr. William “Bill” Colglazier, Science and Technology Adviser to the Secretary of State at the U.S. Department of State. (Pictured at Right)



### Tuesday, April 8, 2014

The final day of the Forum included a morning reporting out session that synthesized the information gathered during the previous day's afternoon thematic sessions, including a live polling session of participants, followed by a lunch with a keynote address by Dr. Kathie L. Olsen, Founder and Managing Director of ScienceWorks and former Deputy Director and Chief Operating Officer of the National Science Foundation. Dr. Olsen presented a very entertaining interpretation of the Tonight Show's Top Ten List including what not to do as a global research university.



“ We're not just talking at each other, we're talking with public agencies such as the U. S. State Department and the National Science Foundation, private industry, non-profit organizations, and international agencies. We share the vision that globally informed inquiry and innovation will provide answers to today's greatest challenges. ”

Kiki Caruson, Assistant Vice President for Research, Innovation and Global Affairs, University of South Florida



Dr. Eirini Gouleta contributes to the final session of the Forum.



### International Funding Agency Perspectives

Tuesday afternoon included concurrent presentations highlighting global research opportunities by funding agency representatives. The funding representatives were available not only to forum participants, but also to USF faculty, students and staff during a Funding Fair open during the morning hours.



International funding agency representatives traveled from across the globe to participate in the Forum.



International funding agency fair, open to the public.



Mr. Errol Levy, EU, speaks with a USF graduate student about funding opportunities.



Dr. Osamu Shimomura gives a presentation about funding opportunities through the Japan Society for the Promotion of Science.

# INTERNATIONAL FUNDING AGENCY SCHEDULE

**8:00-10:00 am** **GLOBAL RESEARCH FUNDING AGENCY FAIR** Patel Center  
*The Funding Fair is free and open to the USF Community including students, faculty and staff.*

**1:30-4:30 pm** **GLOBAL RESEARCH FUNDING SESSIONS: CONCURRENT PRESENTATIONS BY U.S. AND INTERNATIONAL FUNDING AGENCY REPRESENTATIVES** Patel Center  
*Participants are encouraged to rotate between sessions. Sessions 2, 3, and 4 will conclude at 3:15 pm. From 3:55-4:30 pm a networking opportunity with funding agency representatives will be held in the Patel Center, Auditorium.*

	<b>Session 1</b> <i>Patel Center, Auditorium</i>	<b>Session 2</b> <i>Patel Center, Room 136</i>	<b>Session 3</b> <i>Patel Center, Room 138</i>	<b>Session 4</b> <i>Patel Center, 140</i>
<b>1:30-1:35 pm</b>	<b>Welcome &amp; Introductions</b>	<b>Welcome &amp; Introductions</b>	<b>Welcome &amp; Introductions</b>	<b>Welcome &amp; Introductions</b>
<b>1:35-2:05 pm</b>	<b>AUSTRIA:</b> <i>Embassy of Austria</i> <ul style="list-style-type: none"> <li>Mr. Philipp Marxgut, Director of the Office of Science and Technology</li> </ul>	<b>CHILE:</b> <i>National Commission for Scientific and Technological Research (CONICYT)</i> <ul style="list-style-type: none"> <li>Mr. Gonzalo Arenas, Director of International Relations</li> </ul>	<b>JAPAN:</b> <i>Japan Society for the Promotion of Science (JSPS)</i> <ul style="list-style-type: none"> <li>Dr. Osamu Shimomura, Director</li> </ul>	<b>SOUTH AFRICA:</b> <i>National Research Foundation (NRF)</i> <ul style="list-style-type: none"> <li>Dr. Linda Mtwisha, Director for the South African Research Chairs Initiative</li> </ul>
<b>2:10-2:40 pm</b>	<b>GERMANY:</b> <i>German Research Foundation (DFG) &amp; German Academic Exchange Service (DAAD)</i> <ul style="list-style-type: none"> <li>Dr. Max Vöegler, Director of the DFG Office in North America</li> <li>Ms. Solveig Berkman, Financial and Administrative Officer, DAAD New York</li> </ul>	<b>U.S.:</b> <i>CRDF Global</i> <ul style="list-style-type: none"> <li>Dr. Marilyn Pifer, Director of Capacity Building Programs</li> </ul>	<b>KOREA:</b> <i>The Korea-U.S. Science and Cooperation Center (KUSCO)</i> <ul style="list-style-type: none"> <li>Mr. Ki Ho Moon, Director of the National Research Foundation of Korea, U.S. Office</li> </ul>	<b>ISRAEL:</b> <i>U.S.-Israel Science and Technology Foundation (USISTF)</i> <ul style="list-style-type: none"> <li>Ms. Ann Liebschutz, Executive Director</li> </ul>
<b>2:45-3:15 pm</b>	<b>FRANCE:</b> <i>Embassy of France</i> <ul style="list-style-type: none"> <li>Dr. Minh-Hà Pham, Counselor for Science and Technology</li> </ul>	<b>U.S.:</b> <i>International Research and Exchanges Board (IREX)</i> <ul style="list-style-type: none"> <li>Ms. Kirstin Boehm, Senior Development Officer, IREX Education Programs Division</li> </ul>	<b>CHINA:</b> <i>National Natural Science Foundation of China (NSFC)</i> <ul style="list-style-type: none"> <li>Professor Yonghe Zheng, Director-General, Bureau of Policy (<i>presenter</i>) Dr. Zhijun Ren, Program Director, Bureau of International Cooperation</li> </ul>	<b>AUSTRALIA:</b> <i>Embassy of Australia</i> <ul style="list-style-type: none"> <li>Ms. Laura Rahn, Deputy Director of Science and Technology</li> </ul>
<b>3:20-3:50 pm</b>	<b>EUROPEAN UNION:</b> <i>Delegation of the European Union to the United States of America</i> <ul style="list-style-type: none"> <li>Mr. Errol G. Levy, First Secretary, Research and Innovation and Deputy Head of the Science, Technology and Education Section</li> </ul>	<b>Networking Opportunity with Funding Agency Representatives</b>	<b>Networking Opportunity with Funding Agency Representatives</b>	<b>Networking Opportunity with Funding Agency Representatives</b>

**4:00 PM AIEA FORUM ADJOURNMENT**

## Thematic Sessions

Forum participants contributed to brainstorming and discussion during a sequence of interactive thematic sessions during the afternoon of the second day of the conference. In advance of the forum, session leaders, drawn from the Advisory Council, worked collaboratively to design questions to guide the afternoon conversations. Each participant had the opportunity to rotate through each thematic session. Session leaders were responsible for synthesizing the information generated during each small group meeting.

Thematic sessions ran concurrently but each followed the same format: small group brainstorming sessions geared to the individual session questions followed by a larger group discussion of the ideas generated during the brainstorming activities under the guidance of the session leaders.

Session leaders were assisted by three professional facilitators led by Ms. Elizabeth Foster, USF TRAIN® Facilitator.

### THEMATIC SESSION FACILITATORS

- Ms. Elizabeth Foster, TRAIN® Facilitator, USF Research and Innovation
- Ms. Marsha Pesch, USF Export Control Officer, Research Integrity and Compliance, USF Research & Innovation
- Mr. Tim Miller, Program Director, Organizational Development, USF Human Resources
- Ms. Debra Bell, Senior Communications and Marketing Specialist, Technology Transfer Office, USF Research & Innovation

### Thematic Session I: Promoting and Advancing Global Research

Participants and session leaders engaged in a discussion of institutional incentives and challenges to creating a globally-focused research campus.

- ▶ How can International Offices and Research Offices (SIOs and VPRs) better collaborate? Where are areas of overlap or opportunities for collaboration (e.g. responsibilities, priorities, policies)? What are the biggest hurdles to collaboration?
  - ◆ *Session Leader: Dr. Rick Nader, Vice Provost for International Affairs, University of North Texas*
- ▶ What is it that International Offices and Research Offices value? What outcomes/metrics matter most to each office? Where are the differences and where are the areas of possible common ground?
  - ◆ *Session Leader: Dr. Kiki Caruson, Assistant Vice President for Research, Innovation and Global Affairs for USF World, University of South Florida*
- ▶ What are effective strategies for “reaching down” to work with colleges and departments (for example, on things like modifications to tenure and promotion criteria) and for “reaching up” to Provosts, Presidents, and Boards to better facilitate international research?
  - ◆ *Session Leader: Dr. David Stone, Associate Vice President for Research, Northern Illinois State University & Vice President & President-elect, National Organization of Research Development Professionals (NORDP)*



- ▶ What are examples of success stories where Research and International Offices have collaborated successfully at your institution.
  - ◆ *Session Leader: Dr. Bailian Li, Vice Provost for International Affairs, North Carolina State University*

### Thematic Session II: Managing International Research and Global Partnerships

Participants and session leaders engaged in a discussion of ensuring institutional effectiveness in carrying out a global research enterprise.

- ▶ Intellectual property (IP) is increasingly an important dimension of global research projects. How are you successfully addressing this issue at the beginning of your global partnerships?
  - ◆ *Session Leader: Dr. James (Jim) Casey, Pre-Award Manager, Carnegie Mellon University*
- ▶ What do you find to be leading practices in managing the contractual and financial dimensions of your global projects? How have you successfully managed differences in language and culture to ensure that contracts and finance are effectively managed in a timely fashion?
  - ◆ *Session Leader: Dr. Jim Cooney, Vice Provost for International Affairs, Colorado State University*



- ▶ Export controls and human subjects are important dimensions in global research projects. Can you mention some examples where these areas were problematic and ultimately resolved?
  - ◆ *Session Leader: Ms. Cheryl L. Byers, Assistant Vice President for Research Compliance and Integrity, USF Research & Innovation, University of South Florida*
- ▶ Many institutions in developing and developed countries have grant offices varying in size and expertise. What do you face with these different dynamics and how do you address them?
  - ◆ *Session Leader: Dr. Elliott Kulakowski, CEO, Society of Research Administrators (SRA) International*



### Thematic Session III: Measuring the Success of Global Research Engagement

Participants and session leaders engaged in a discussion of the benefits and challenges associated with developing and utilizing metrics to evaluate global engagement at the institutional level, including the impact of global research and the success of international partnerships.

- ▶ What are the benefits associated with developing and utilizing metrics to evaluate and assess global engagement at the institutional level?
  - ◆ *Session Leader: Dr. Prema Arasu, CEO and Vice President of the Kansas State University Olathe Campus, Kansas State University*
- ▶ What are the challenges associated with developing and utilizing metrics to evaluate and assess global engagement at the institutional level?
  - ◆ *Session Leader: Mr. Brad Farnsworth, Director, Center for Internationalization and Global Engagement, American Council on Education (ACE)*
- ▶ Should institutions consider metrics at the sub-institutional level as well as the institutional level, especially at the level of individual disciplines? Discuss why or why not.
  - ◆ *Session Leader: Mr. Dan Morgan, Senior Manager for Global Academic Relations, Elsevier*
- ▶ What strategies are universities developing for cultivating and enhancing global research collaborations/activities?
  - ◆ *Session Leader: Dr. John Carfora, Associate Provost for Research Advancement and Compliance, Loyola Marymount University*

### Lessons Learned: Bridging the Divide between Research and International Offices

The brainstorming activities conducted during the Thematic Break-Out Sessions resulted in a series of recommendations and lessons learned regarding the promotion, management and

measurement of international research engagement.

### Promoting and Advancing International Research

- ▶ Clearly identify how internationally funded research contributes to institutional prestige.
- ▶ Develop a set of common strategic and planning goals shared by the research and international offices that are also connected to the University's mission.
- ▶ Cultivate an environment where communication between the two offices is routine.
- ▶ Create various types of opportunities for interaction across units (for example cross representation on internal workgroups or committees).
- ▶ Educate staff and administrators about the roles and responsibilities of both offices; develop a common working vocabulary.
- ▶ Agree to shared-responsibilities such as export control, risk management and/or student mobility.
- ▶ Make the connection between international partnerships (MOUs), and opportunities for faculty and student research.
- ▶ Create a position(s) or unit dedicated to advancing international research engagement; share the costs and benefits of this unit between the traditional research and international offices. Or, situate a research administrator in the international office.
- ▶ Establish internal funding opportunities supported by both



the research and international offices.

- ▶ Disseminate information about international research opportunities via merged (international and research) email lists.
- ▶ Jointly (research and international) offer a series of workshops for students and faculty targeting research opportunities funded by international agencies or organizations (Horizon 2020 and others).
- ▶ Include international engagement in tenure and promotion guidelines.
- ▶ Enfranchise faculty and students in activities with international visitors or institutional partners.
- ▶ Reach out to alumni who are international success stories; build connections with alumni overseas.
- ▶ Engage the senior international office and the vice president for research for trips abroad for the purpose of partnership development, fundraising/ advancement and networking.

### *Managing International Research and Global Partnerships*

- ▶ Collaboration between the research and international offices is critical as intellectual property (IP) becomes an increasingly important dimension of global research projects.
  - ◆ Create an office of economic development and commercialization with an international component.
  - ◆ Define and determine intellectual property rights at the beginning of an international partnership; a pre-proposal or separate MOU may be necessary.
  - ◆ Standardize language usage.
  - ◆ Find the balance between the technical aspects of IP (research office) and the interpersonal or “mission” aspects of international collaboration (international office).
- ▶ How can a University effectively engage its research and international offices to manage the contractual and financial dimensions of global research projects as well as the language and cultural differences inherent in cross-national collaboration?
  - ◆ Recognize time, language and cultural differences in project management; the research office may manage the contract negotiation, but the international office has resources to inform the cultural context.
  - ◆ Conduct regular visits between partner institutions and include both the research and international offices.
  - ◆ Keep communication consistent across all parties and strengthen and utilize trust networks.
  - ◆ Develop a cadre of contract managers with legal and global training who work collaboratively on international financial and IP issues.
  - ◆ Know when to look in-house and when to outsource; utilize consultants and professionals when needed.
  - ◆ Create international agreements in at least two languages, English and the language of the partner country; utilize third party translation services for non-English agreements.
- ▶ Export control and activities involving human subjects are often critical components of international research.
  - ◆ Research and international offices work together to educate faculty and students about the importance of export control and risk management.
  - ◆ Educate staff of both the research and international offices about export control laws and policies and how export control is managed at the university.
  - ◆ Cultivate collaboration across the
- research and international offices regarding incoming students from high risk countries and the placement of international students in U.S. university labs.
  - ◆ Develop a shared system (research and international offices) for tracking international visitors with respect to sensitive research facilities and laboratories.
  - ◆ Identify a single point of contact at the university for the management of export control policy.
  - ◆ Research involving human subjects adds a layer of complexity to the management of cross-cultural issues.
    - Involve the international office or use consultants if necessary.
  - ◆ Be aware of cultural and/ or religious sensitivities; train staff in both the research and international offices regarding cultural norms and expectations.
- ▶ Managing research projects with partners in developing countries
  - ◆ Cultivate strong intercultural communication skills and the ability to translate policy and practice across borders.
  - ◆ Understand that capacity levels can vary greatly across countries, regions, and institutions.
  - ◆ If collaborating with a less experienced partner, assume a mentor role.
  - ◆ Develop a sensitivity to how partners manage their research portfolios and partnerships.
    - Level of knowledge regarding research management
    - Level of government regulation or control
    - Level of resources and consistency of office staff
  - ◆ Communicate early and often (across the international and research offices) and with international partners.
  - ◆ Discuss financial accountability at the outset of each project;

include a written agreement of expectations and organizational roles. Be aware that a variety of attitudes exist internationally about how to manage funds.

- ◆ Commit to yearly visits and exchanges of personnel.

### **Measuring the Success of Global Research Engagement**

Overall, metrics regarding international research engagement were judged to be important and necessary, despite the potential drawbacks.

#### ► The Up-Side of Metrics

- ◆ Metrics provide justification of international work; this information is beneficial not just to the research and international offices, but to other university units as well.
- ◆ Metrics for global research engagement contribute to reputation and prestige and can be used to identify areas of research strength, critical mass as well as signature programs.
- ◆ Metrics facilitate assessments of return on investment(s), strategic planning, and the measurement of goals.
- ◆ Collect data to help identify goodness of fit with international partners.
- ◆ Utilize metrics regarding research strengths to identify and promote partnerships in countries of strategic opportunity.
- ◆ Performance measures can be used to recognize and reward faculty and students (or units) for achievement in the international research arena.
- ◆ Encourage productive competition across units/colleges/departments.
- ◆ Metrics can be topical (sustainability; energy; citizenship) instead of unit based (department or college).
- ◆ Synthesize metrics for international

research, partnerships, recruitment, and advancement to paint a complete portrait of the university's global profile.

#### ► The Down-Side of Metrics

- ◆ We tend to value what we can measure.
- ◆ What is being measured and how is it measured (quantity vs. quality)
- ◆ Prioritization of metrics; who is being enfranchised and who might be disenfranchised; who benefits?
- ◆ Accuracy and reliability of the data; longevity of data collection.
- ◆ May encourage unproductive comparisons across units, departments or disciplines.
- ◆ Resources and staff needed to collect and analyze data; burden could too easily fall to faculty.



Dr. Rick Nader leads a thematic session discussion.

### **Next Steps**

The proceedings of the Forum will be published by Elsevier Publishing Company and released later this year.

The topic of integrating the work of universities' research and international offices takes center stage at the 2014 Association of Public and Land-Grant Universities' (APLU) summer meeting in Berkeley, California (July 2014). APLU meetings are considered among the premier agenda-setting conventions in higher education. Forum participants universally

agreed that too few opportunities exist for networking across the research and international domains. Professional organizations tend to appeal to either research administrators or to international educators. The Forum recommends regional forums to continue the conversation and an annual opportunity for stakeholders to come together to brainstorm, share success stories, learn from one another, and network across the public, private, non-profit and academic domains.

“ Thank you for a wonderful conference and the opportunity to interact with an exceptional group of professionals. The event was the highlight of the academic year.”

- Eugene Murphy, Assistant Vice President, Centers for Global Advancement & International Affairs, Rutgers, The State University of New Jersey

## Keynote Speaker Presentations & Biographies

Presentation materials from the Forum's keynote speakers can be found at the Forum's website: <http://global.usf.edu/globalforum/>



**Dr. William "Bill" Colglazier, Science and Technology Advisor to the U.S. Secretary of State John Kerry, U.S. Department of State**

*The Global "Science, Technology, and Innovation" Horizon and the American Research University.*

E. William "Bill" Colglazier, Ph.D. was appointed in July 2011 as the fourth Science and Technology Adviser to the Secretary of State. The mission of the Office of the Science and Technology Adviser to the Secretary (STAS) is to provide scientific and technical expertise and advice in support of the development and implementation of U.S. foreign policy. The Adviser serves as an advocate for science-based policy at the State Department, helps to identify and evaluate emerging scientific and technical issues that affect U.S. strategic interests, brings scientific expertise to the Department, and helps to promote scientific and technological capacity-building and science-based policymaking internationally. The Adviser also provides outreach to the U.S. and international scientific community and helps to facilitate scientific cooperation between the United States and other countries.

From 1994 to 2011, Dr. Colglazier served as Executive Officer of the National Academy of Sciences (NAS) and the National Research Council (NRC). From 2000 to 2011 he also served as NRC Chief Operating Officer. In these roles he helped to oversee the studies conducted by the NRC, which is the operating arm of the NAS, the National Academy of Engineering, and Institute of Medicine. Working together they provide independent, objective advice to the nation on public policy issues where insights and expertise from science, technology, and medicine are needed. From 1991 to 1994, Dr. Colglazier was Executive Director of the Office of International Affairs of the NAS and NRC, overseeing collaborative projects with scientific organizations in many countries.

From 1983 to 1991, Dr. Colglazier was Professor of Physics and Director of the Energy, Environment, and Resources Center at the University of Tennessee where

he worked closely with scientists at Oak Ridge National Laboratory. He received his Ph.D. in theoretical physics from the California Institute of Technology in 1971, and prior to 1983 worked at the Stanford Linear Accelerator Center, the Institute for Advanced Study in Princeton, and the Center for Science and International Affairs at Harvard's Kennedy School of Government. While at Harvard, he also served as Associate Director of the Program in Science, Technology, and Humanism of the Aspen Institute. In 1976-77, he was an AAAS Congressional Science Fellow working for Congressman George Brown. He is past chair of the Forum on Physics and Society of the American Physical Society and a Fellow of the American Association for the Advancement of Science and the American Physical Society.



**Dr. Rob Bertram, Bureau for Food Security, U.S. Agency for International Development (USAID)**

*Looking to the Future: Capacity Building Programs in Agriculture and the Creation of the U.S. Global Development Lab*

Dr. Rob Bertram is the Director of USAID's Office of Agricultural Research and Policy in its Bureau for Food Security. The office is responsible for USAID strategies and investments in technology, research and policy under the Feed the Future program, the U.S. government's global food security initiative. In carrying out the office's mandate, Dr. Bertram works closely with the international agricultural research centers of the CGIAR system, U.S. university-led research Innovation Labs in science and policy, and a range of public and private international partnerships in biotechnology, policy, extension and education.

Equipped with a plant breeding and molecular genetics background, Dr. Bertram has worked in international agricultural research and development programs at USAID for more than 25 years, emphasizing science for development partnerships across Asia, Africa and Latin America, as well as with Europe and Australia. Prior to his USAID career, Dr. Bertram worked at the CGIAR's International Center for Agricultural Research in the Dry Areas (ICARDA) and the U.S. Department of Agriculture. His professional interests include genetic resources conservation and policy, biotechnology, agriculture-nutrition linkages, and the broader role of science in development.



**Dr. Kathie Olsen, Founder and Director, ScienceWorks, and Former Deputy Director and Chief Operating Officer, National Science Foundation**

*Growing Global Research: Two Takes on the "TOP 10"*

Dr. K. L. "Kathie" Olsen, Ph.D. is the Founder and Managing Director of ScienceWorks, a consulting firm in Washington, D.C. ScienceWorks is dedicated to helping people and organizations succeed in their science and engineering research pursuits. Dr. Olsen is also an Affiliate Professor of Neuroscience at the Krasnow Institute for Advanced Study, George Mason University.

Before founding ScienceWorks, Dr. Olsen served over 20 years in the federal government in a variety of scientific leadership positions, including the Deputy Director and Chief Operating Officer of the National Science Foundation (NSF); Associate Director and Deputy Director for Science of the Office of Science and Technology Policy (OSTP) in the Executive Office of the President; Chief Scientist for the National Aeronautics and Space Administration (NASA) and the Acting Associate Administrator for NASA's Biological and Physical Research Enterprise. She also served as Vice President for International Programs at the Association of Public and Land-grant Universities (APLU).

Dr. Olsen holds numerous career awards including four honorary doctorates from various U.S. universities, NASA's Outstanding Leadership Medal, the NSF Director's Award of Excellence, and the Norwegian Royal Order of Merit. She is an elected Fellow of the American Association for the Advancement of Science and the Association for Women in Science.



**Dr. Karen Holbrook, Senior Advisor to the President, University of South Florida and Former President of The Ohio State University**

*Bridging the Divide—Closing the Gap*

Dr. Karen A. Holbrook, Ph.D., is the Senior Advisor to the President at the University of South Florida (USF). Prior to this position, she served as the Senior Vice President for Global Affairs

and International Research as well as the Senior Vice President for USF Research and Innovation. Before joining USF, Dr. Holbrook served as president of The Ohio State University from 2002-2007. She was also the senior vice president for academic affairs and provost and professor of cell biology at the University of Georgia, vice president for research and dean of the Graduate School at the University of Florida, and associate dean for research and professor of biological structure and medicine at the University of Washington, School of Medicine.

Dr. Holbrook has served on the boards of the American Association for the Advancement of Science (AAAS), the Association of American Medical Colleges (AAMC), the American Council of Education (ACE), the National Association of State Universities and Land-Grant Colleges (now APLU), the Association of American Universities (AAU), The Council of Graduate Schools (CGS), and Accreditation Council for Graduate Medical Education (ACGME), among others. She has participated on numerous advisory panels and councils for the National Institutes of Health. She is currently on several boards, including the Institute of International Education (IIE), ACT, and recently completed her term as chair of the board for Oak Ridge Associated Universities (ORAU). She has been a member of the International Advisory Councils of KAUST (King Abdullah University of Science and Technology) since its founding in 2006, and serves on the KAUST Board of Directors. Dr. Holbrook is also Trustee for Embry Riddle Aeronautical University.



**Mr. Dan Morgan, Senior Manager for Global Academic Relations, Elsevier**

*Developing Institutional Strategies for Growing Global Research—Elsevier Research Intelligence*

Mr. Dan Morgan is Senior Manager in the Global Academic Relations department of Elsevier, with a specialty in Open Access. His role is to help develop and drive strategy for sustainable access to research by engaging with, and connecting, funding bodies, government departments, academic institutions, the technology sector, and all potential partners. He also drives other projects and engagement initiatives around research intelligence and research growth. He has worked at Elsevier for 13 years, first in Oxford, United Kingdom, and then in San Francisco, California since 2008.



Prior to the Global Academic Relations group, Mr. Morgan was head of the Psychology and Cognitive Science journals group as Executive Publisher. He began his career at Elsevier in the Research department, working in market research, scientometrics, and analytics.



***Dr. Tim Fournier, EdD.,  
Managing Director, Huron  
Consulting Group***

*Globalization in Higher  
Education: Time to Change Our  
Thinking*

Dr. Fournier's professional experience spans more than 25 years including nearly 20 years assisting academic institutions with business planning, establishing operations, enhancing enrollment management practices, assessing compliance, improving processes and management tools, and creating training and education programs with a special focus on the unique and challenging requirements for administering research in an academic environment. His career includes comprehensive work in research administration, enrollment management, and finance and administration both as a consultant and as a campus leader.

Prior to joining Huron, Dr. Fournier was the senior associate dean for finance and administration and first chief operating officer for Northwestern University in Qatar. He also served Northwestern University as its first associate vice president for research integrity. Other professional experiences include serving as the compliance officer for the University of Pennsylvania and Penn Medicine and providing a variety of compliance and operational consulting services to higher education and healthcare clients. Dr. Fournier is a co-founder of the University Compliance Group and co-founder and original Steering Committee Member, *AAMC Forum on Conflict of Interest in Academe*

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	<b>Name</b>	<b>Title</b>	<b>Affiliation</b>
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Virginia Commonwealth University  
Washington State University

## Forum Event Schedule

<b>AIEA THEMATIC FORUM EVENTS</b>	
<b>SUNDAY—APRIL 6, 2014</b>	
6:00-7:00 pm	Registration & Networking Reception Keynote Dinner <i>Welcome Remarks:</i>
7:00-8:00 pm	<ul style="list-style-type: none"> <li>• Dr. Rick Nader, Vice Provost for International Affairs—<i>University of North Texas</i></li> <li>• Dr. Sudeep Sarkar, Associate Vice President for Research &amp; Innovation, USF Research &amp; Innovation—<i>University of South Florida System</i></li> </ul> <i>Opening Remarks:</i> Dr. Judy Genshaft, President and CEO/Corporate Secretary— <i>University of South Florida System</i> <i>Keynote Address:</i> Dr. Rob Bertram, Director, Office of Agricultural Research & Policy, Bureau for Food Security— <i>U.S. Agency for International Development (USAID)</i>
<b>MONDAY—APRIL 7, 2014</b>	
8:00-9:00 am	Registration
9:00-9:15 am	Opening Remarks from the University of South Florida and the University of North Texas
9:15 am-12 pm	Panel Discussion & Participant Dialogue: <i>Articulating the Value Proposition—Making the Case for Institutional Global Engagement in Research</i> <i>Moderators:</i> <ul style="list-style-type: none"> <li>• Dr. John Carfora, Associate Provost for Research Advancement and Compliance—<i>Loyola Marymount University</i></li> <li>• Dr. Rick Nader, Vice Provost for International Affairs—<i>University of North Texas</i></li> </ul> <i>Panelists:</i> <ul style="list-style-type: none"> <li>• Dr. William Farland, Senior Advisor to the Executive Vice President, Professor of Environmental and Radiological Health Sciences, &amp; Former Vice President for Research—<i>Colorado State University</i></li> <li>• Dr. Jane Gatewood, Director of International Partnerships—<i>University of Georgia</i></li> <li>• Dr. Prema Arasu, CEO/Vice President of the Kansas State University Olathe Campus—<i>Kansas State University</i></li> </ul> Keynote Lunch Panel <i>Introduction:</i> Dr. Roger Brindley, Vice Provost and USF System Associate Vice President for USF World— <i>University of South Florida System</i> <i>Panelists:</i> <ul style="list-style-type: none"> <li>• Dr. Karen Holbrook, Senior Adviser to the President—<i>University of South Florida</i> and Former President—<i>The Ohio State University</i></li> <li>• Dr. Timothy J. Fournier, Managing Director—<i>Huron Consulting Group</i></li> <li>• Mr. Dan Morgan, Senior Manager for Global Academic Relations—<i>Elsevier</i></li> </ul>
12:30-1:45 pm	Afternoon Thematic Sessions: <i>Concurrent Working Groups</i> <b>Theme I: Promoting and Advancing Global Research</b> <i>Participants and session leaders will engage in a robust discussion of institutional incentives and challenges to creating a globally-focused research campus. Topics will include how campuses can maximize competitiveness for global research opportunities; create systems to optimize faculty and student global research engagement; support policies and reward and incentive structures for globally engaged research and creative activities; link/organize functional expertise across campus for best results; and cultivate an environment that values international engagement among faculty, staff and students.</i> <b>Theme II: Managing International Research and Global Partnerships</b> <i>Participants and session leaders will engage in a robust discussion of ensuring institutional effectiveness in carrying out a global research enterprise. Topics will include how to manage risk; IP; travel; research integrity and RCR; accountability and mutual understanding among global partners; financial and contractual relationships in multi-cultural and multi-language environments; how to manage differences across culture and language in research settings; and how to set the stage for successful partnerships across institutions.</i> <b>Theme III: Measuring the Success of Global Research Engagement</b> <i>Participants and session leaders will engage in a robust discussion of the benefits and challenges associated with developing and utilizing metrics to evaluate global engagement at the institutional level, including the impact of global research and the success of international partnerships. Topics will include types of assessment tools; evaluating the impact of global engagement; methods for mapping a university's global footprint; and strategies for cultivating productive global activities.</i>
5:30-6:30 pm	Social Reception: <i>U.S. and International Funding Agency Meet and Greet</i>
6:30-8:00 pm	Keynote Dinner <i>Introduction:</i> Dr. Prema Arasu, CEO/Vice President of the Kansas State University Olathe Campus— <i>Kansas State University</i> & Dr. Elizabeth E. (Libby) Lyons, Senior Adviser, Office of Science and Technology Adviser to the Secretary of State and Bureau of Oceans and International and Environmental and Scientific Affairs— <i>U.S. Department of State</i> <i>Keynote Address:</i> Dr. Bill Colglazier, Science and Technology Adviser to the Secretary of State— <i>U.S. Department of State</i>
<b>TUESDAY—APRIL 8, 2014</b>	
9:00-10:00 am	Reporting Out: <i>Summary of Thematic Sessions</i> International Funding Agency Fair – open to the public
10:30-11:30 am	Cross-Talk: <i>Conversations Amongst Participants</i> Keynote Lunch
12:00-1:00 pm	<i>Introduction:</i> Dr. Kiki Caruson, Assistant Vice President for Research, Innovation, and Global Affairs for USF World— <i>University of South Florida System</i> <i>Keynote Address:</i> Dr. Kathie L. Olsen, Founder and Managing Director— <i>ScienceWorks</i> and Former Deputy Director and Chief Operating Officer— <i>National Science Foundation</i> and Former Chief Research Officer— <i>National Aeronautics and Space Administration (NASA)</i>
1:30-4:30 pm	Global Research Funding Sessions: <i>Concurrent Presentations by U.S. and International Funding Agency Representatives</i>
4:30 pm	Adjourn

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